PIRS:Sourcing Guide

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Content

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PIRS:Sourcing is a supply management tool with the main goal to optimize the planning, execution, control, and monitoring of supply chain activities.

> **Do you have questions? Then contact us any time!**
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> **Website:** www.sobis.com

1 Home

PIRS:Sourcing is a supply management tool with the main goal to optimizes the planning, execution, control, and monitoring of supply chain activities.

2 Internal application

The internal application is hosted on your company intranet and can only be accessed by internal users.

2.1 Access, navigation & personalisations

Users access the application either as internal company users with single sign on or via the PIRS:Sourcing portal in which case each users have to self register and get approved by the company that runs the internal application.

The following chapters will explain to users of the internal application how to access the system and navigate within the pages. They will also introduce how users are able to customise and personalise views and personal settings.

Portal users will find a detailed explanation in chapter Portal.

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2.1.1 Access the application
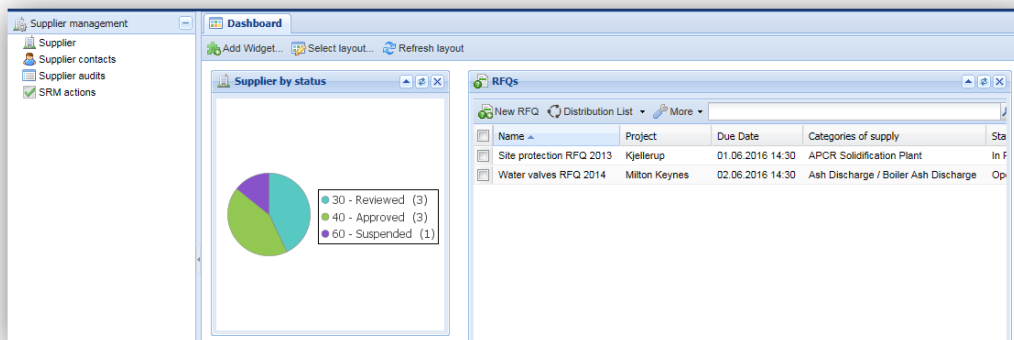
PIRS:Soucing is a web based application and supports Internet Explorer 11+ as well as Firefox.

To access the application open your preferred internet browser and enter the provided URL.

Due to the Single-Sign-On (SSO) functionality you will be automatically logged in as soon as the application page is displayed in your browser.

As shown in the above screenshot the page is divided into two sections. On the left hand side you'll find the navigation pane which allows you to access the different areas of the application, such as "Supplier Management" or " Sourcing".

On the right hand side a number of widgets are offered in a dashboard. The number and type of widgets can be altered to fit your needs.

For further information on this subject refer to chapter Customise your dashboard.

2.1.2 User interface & navigation

On the left hand side of the user interface there is a navigation area. In case you prefer to use your entire browser screen to display your selected content the navigator can be folded to the side by clicking the small blue arrow head marked in orange within the image below. The navigation area is structured into three different sections each including various subsections which can be easily expanded by clicking the 	⊞ button. You can choose between the selection options "Supplier Management", "Sourcing" and "Reporting".

The supplier management section as demonstrated in the following screenshot allows you to administer the supplier and supplier contacts that have registered with your application. Furthermore you can define an action for a specific supplier contact and manage supplier audits.

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The sections "Sourcing" and "Reporting" allow you to open different grids within the respective topics. For further explanation and instructions please refer to the according chapters. (Sourcing, Reporting)

On the right side of the user interface your selected content, e.g. a specific view or document, will be displayed. The default start page automatically opens your dashboard containing various widgets for a quick overview of your most important activities and tasks. (Customise your dashboard)
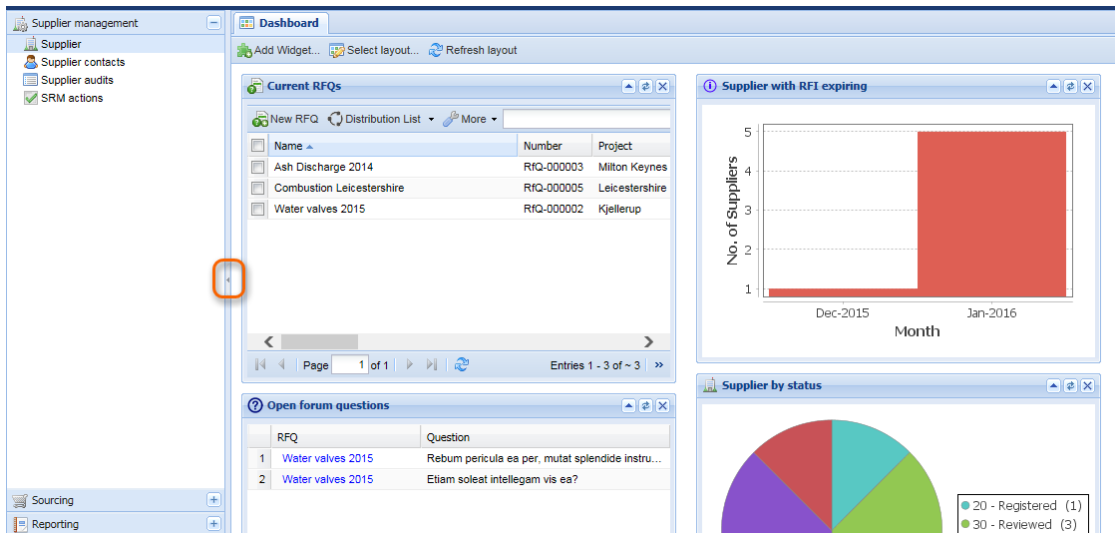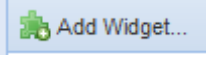
2.1.3   Customise your dashboard
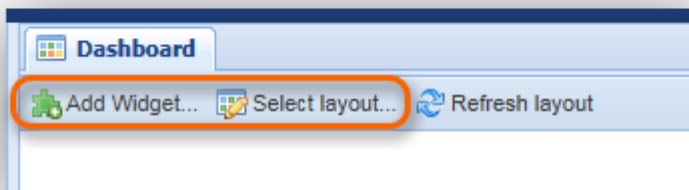
The application provides you with a dashboard which can be customised to reflect your preferences.

The dashboard offers a selection of widgets that refer to certain information or the contents of different views within your application. In addition to selecting your preferred widgets you are also able to arrange their order and manage the dashboard layout.

How to adjust your widgets

By adding widgets you can modify, adjust and personalise your dashboard settings. To add

widgets, e.g. a widget for your open forum questions, click the [Add Widget...] button in the

left upper corner of the dashboard.

When clicking the action "Add Widget" a new window opens which offers a variety of different

widgets.

Select the widget you would like to add to your dashboard and confirm by clicking the "Add

Widget" button, compare with the following image.
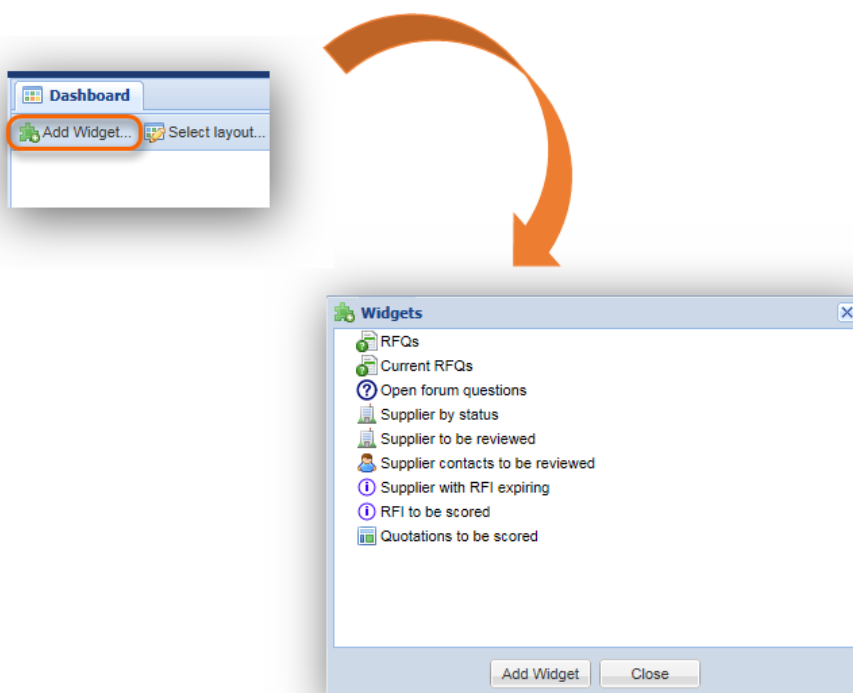
Once you have added all the widgets you would like to display on your dashboard click

"Close". Each selected and added widget will initially appear following the previously

chosen layout but you can rearrange the order via drag and drop.

Widgets can easily be removed by clicking the X-button in the right upper corner of the widget.

How to adjust your layout:

You are able to define the way your selected widgets are arranged and positioned on the

dashboard. By clicking the "Select layout" action which is located at the upper left hand side of

your dashboard (outlined in orange on the following image) you will open a window that offers

five different layout styles.
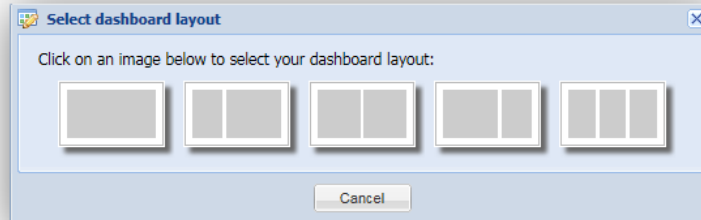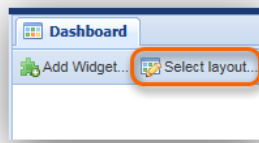
After selecting your dashboard widgets as well as your preferred dashboard layout you can arrange the widgets using "drag & drop" as indicated in the following image.
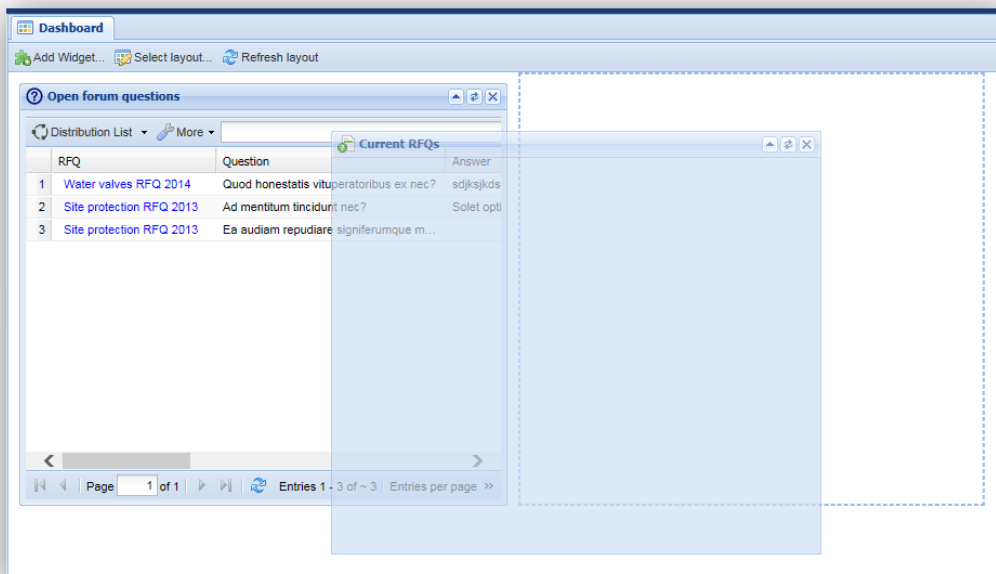
2.1.4   Customise your grid & use filter
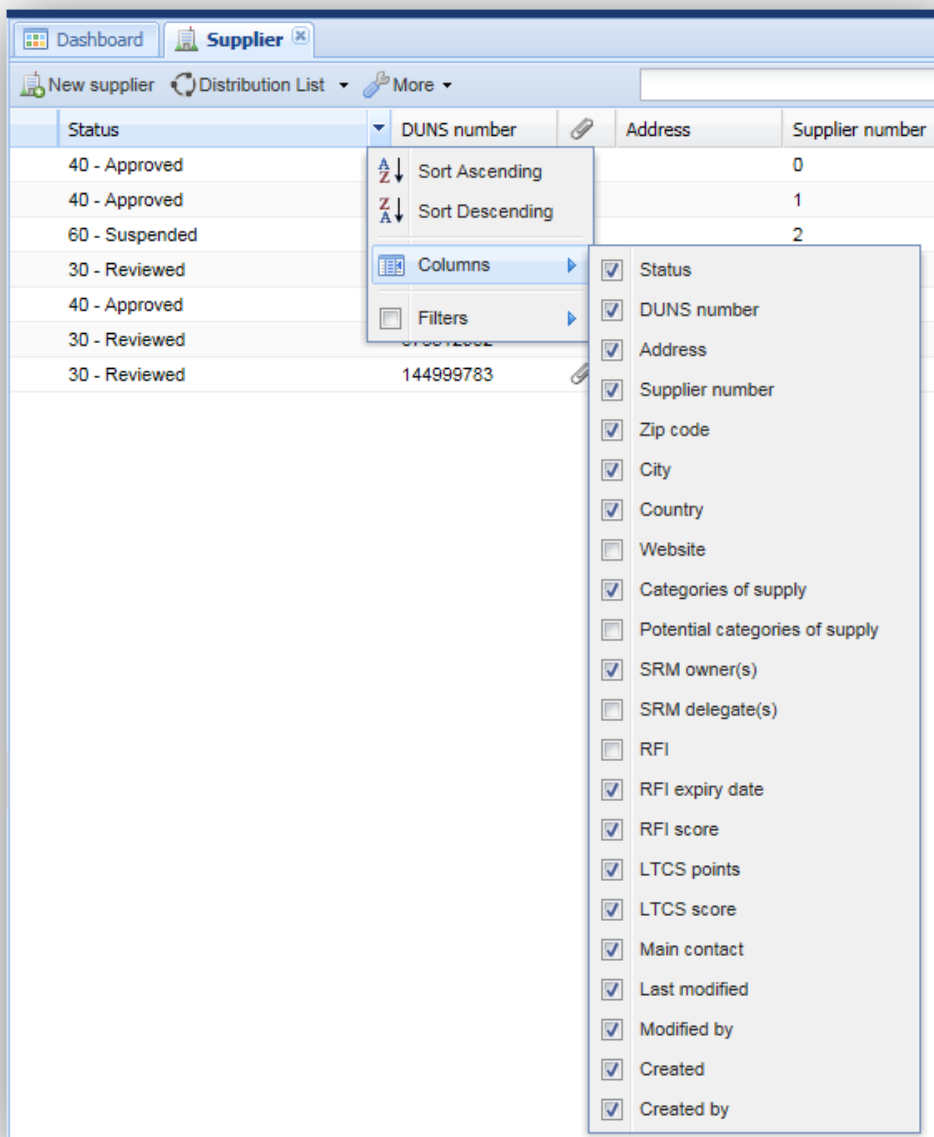
The application enables you to customise the display of every grid by selecting and changing the displayed columns as well as rearranging the order of the columns. The following chapter will illustrate how to modify a grid using the example of the grid "Suppliers".

All available columns can be added or removed. First, move your cursor over any of the displayed columns. A small arrow head pointing downwards will appear in the corner of the

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column. As indicated by the screenshot, a window listing several options will be displayed as soon as you click the arrow head.

Next, select the option "Columns" and a list of all available columns will be displayed. The columns currently displayed in the grid are indicated by check marks. You can select or deselect any columns as required.

In a further step you can restructure the order of the columns via drag and drop. Simply left-click the column you would like to reposition and hold the left-click while you move the column from its initial position to the position you prefer. Your customisation will be stored. When you close the application your current grid display is saved and will be presented to you the same way in your next session.

Any Customisation can be reset within your personal settings (compare User preferences).
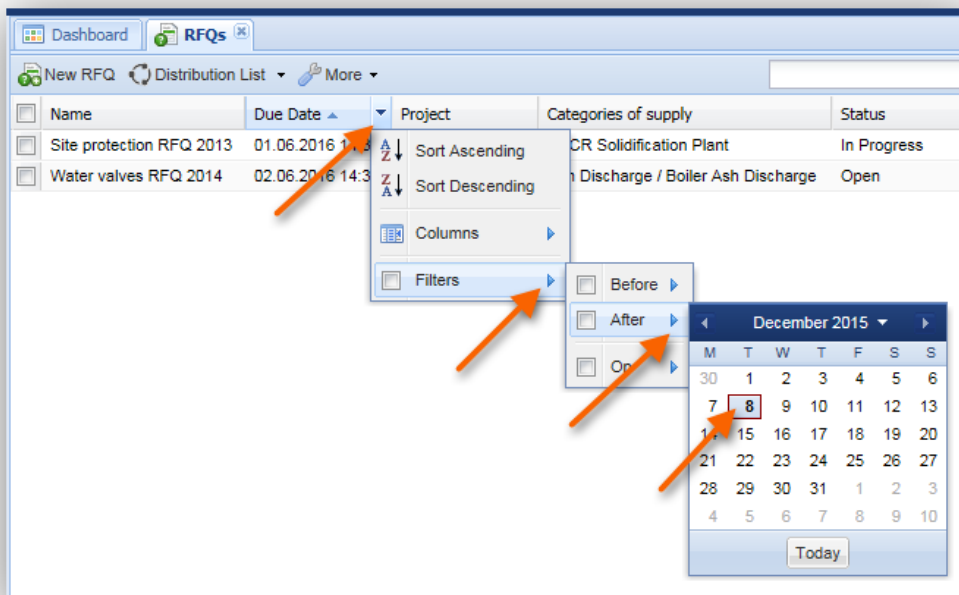
Filter selection

The application allows you to use filters in order to search for specific information within a grid.

To activate a filter click the arrow head in the corner of the column that you want to use for your search and hover your cursor over the "Filter" option in the displayed selection box.

As illustrated in the image, for each column there are column specific filter options to choose from. In this example you have the choice to select either a filter that shows all RFQ's that will expire before, after or on a specific due date.

In order to narrow down your search you can use multiple filters. There are no limitations on the number of filters you can set.

Each filter can be deactivated simply by removing the check mark in the column selection box.
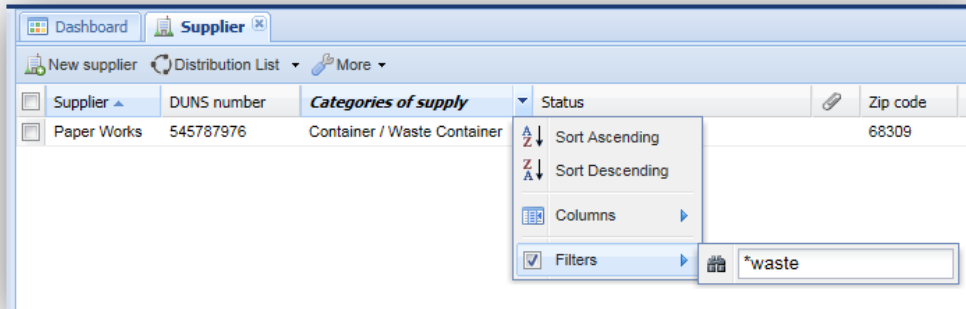
For certain columns you are able to enter a value manually. In case you are not sure about the exact value or search phrase, it is possible to partially enter a value.

Should you only enter a partial word, it is necessary to insert the * wildcard symbol in front of, as well as after your search phrase. You also need to add the * symbol in front when the first letters of your search value don't have the same first letters of the particular value you are looking for.

For example, you would like to filter Supplier entries for certain categories of supply in which they belong e.g. "Container / Container Shunting Installation" or "Container / Waste Container". If you enter "Container" in your filter for the "Category of Supply" column you don't need to add a * symbol because the value you are looking for starts with "Container". Should you search for "Waste Container" however, you need to enter " * " before you start to type "Waste".

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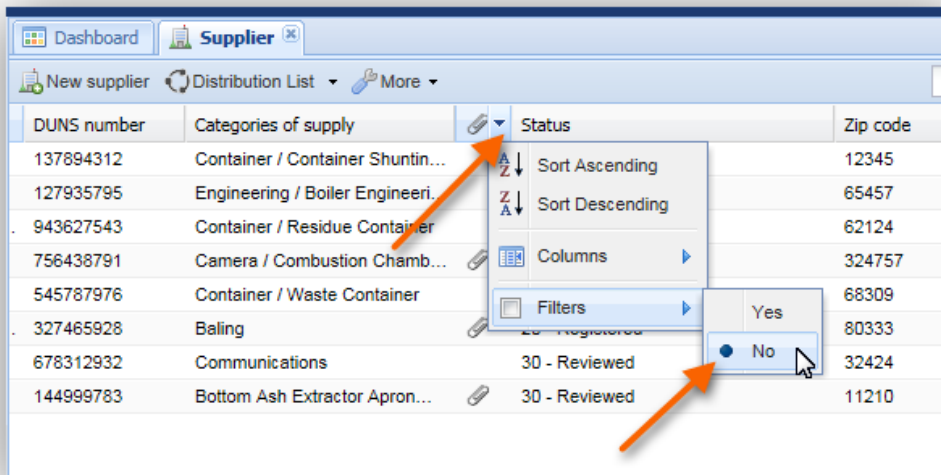
You are also able to filter for existing attachments. For example, you need to know how many supplier documents currently don't have any attachments attached you can select "No" for the column attachments, as illustrated in the screenshot below.

Filters can be deactivated one by one or all together. If you would like to deactivate all filters click the [×] button in the action bar and select the action 🗑 Clear Filters

When you close or reopen a grid all set filters will be cleared automatically. This also happens when you reselect the current view in your navigation area. All previously set filters will be deleted and the entire grid content will be displayed.

Use of the refresh action offered to you in every grid however will not reset the filters. If you click the refresh button after having set filters, your filter selection will still be valid.

2.1.5   Full-text search

The search function in the application is a very useful and flexible feature. The content of each grid can be searched for specific information based on certain keywords or a user defined string. The full-text search hereby considers all existing entries and includes the content of attachments stored within the gird.

The search function provides the possibility to search for any given or user-defined term within all documents displayed in the grid you are currently working in. The results of a full-text search are listed according to the frequency of the search term within each found document. Therefore, those documents in which the search term has been found most frequently are listed at the top of the list.

2.1.5.1 Search within a grid:

In order to initiate a search within a particular grid e.g. the "RFQs" grid, enter the term you would like to search the grid content for, into the text field in the right hand corner of the grid action bar, outlined in the following screenshot, and either hit enter or click the

? Unknown Attachment button.

The results are calculated and displayed as soon as you click the search symbol. As you can see in the screenshot below, the first couple of results carry the search term within their subject name but there are also results displayed that don't show the term in any visible value field. This would be an example where the term was only found in the document body or the

attachment. By clicking the **?** Unknown Attachment button the search box will be cleared, revoking the search result display.

2.1.5.1.1   The full text search functions:

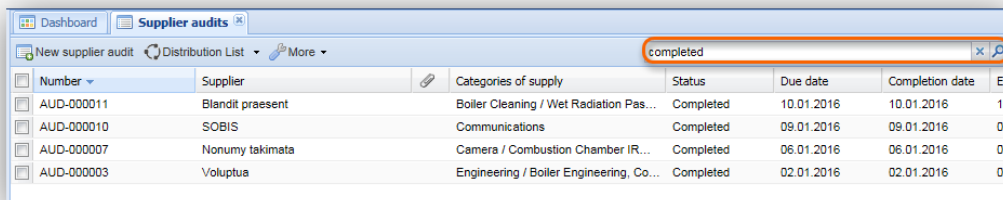In order to allow you to search for exactly the search terms you need, the application's full text search enables you to create your own queries, search for word fragments or narrow down your search by excluding or including specific word combinations. The search itself is not case sensitive. So regardless of whether you enter e.g. ELECTRICAL, Electrical or electrical, the result will be the same. Nevertheless it should be noted that the search term should ideally be entered in lower case letters in order to help the system to differentiate between the search term and the offered Boolean operators.

The Wildcard

Among other features the search includes the possibility to insert the ? symbol as a wild card for a letter within a search term or the * symbol to replace several letters within a word or a phrase. Instead of the search term *mechanical* you could for example enter mechani?al and in order to insure all word combination that could refer to civil engineering (civil-engineering, civ. engin., civil ENG, ...) you could type civ*.

Search for a string

In order to ensure that the result will return found matches for exactly a specific combination of words e.g. Combustion Chamber 0097, you are able to enclose the search phrase into

quotation marks ("Combustion Chamber 0097"). In this case the search will display only those documents where this exact word combination could be found. Should you for example search for all documents where your name is mentioned you could enter "User Name".

Boolean Operators

You can use Boolean operators which allow terms to be combined through logic operators. The syntax supports "AND", "+" and "OR" as combining Boolean operators and "NOT" or "-" in order exclude or prohibit certain terms from the search.

In general the OR operator is used as default conjunction operator; meaning that in case you haven't entered any Boolean operator between two terms the OR operator is used automatically. The search will then find all matching documents where either term or both terms exist. The letter Boolean operators must be ALL CAPS.

Please be aware that there is a slight difference between using operator written in all caps letters and symbol operator and they will not always return the same results.

The "NOT" operator and the "-" operator for example both exclude documents that contain the term that follows directly after the operator but only the "-" operator can be use as a single search requirement. The "NOT" operator on the other hand can not be used as a stand-alone. This means that a search like "NOT civil" will always return no search results even though there might be many hits for documents that don't contain the word civil. However, should you enter the query syntax "- civil" the search will display all documents not containing the term "civil". There can also be different results when combining both types of operators. In order to minimise any mix-ups in your search results, we recommend always to use quotation marks framing your search terms.

2.1.6   User preferences

Every user has the opportunity to modify their settings to match their personal preferences.

You can access your settings by clicking the small arrow head in the top right corner as indicated by the image.
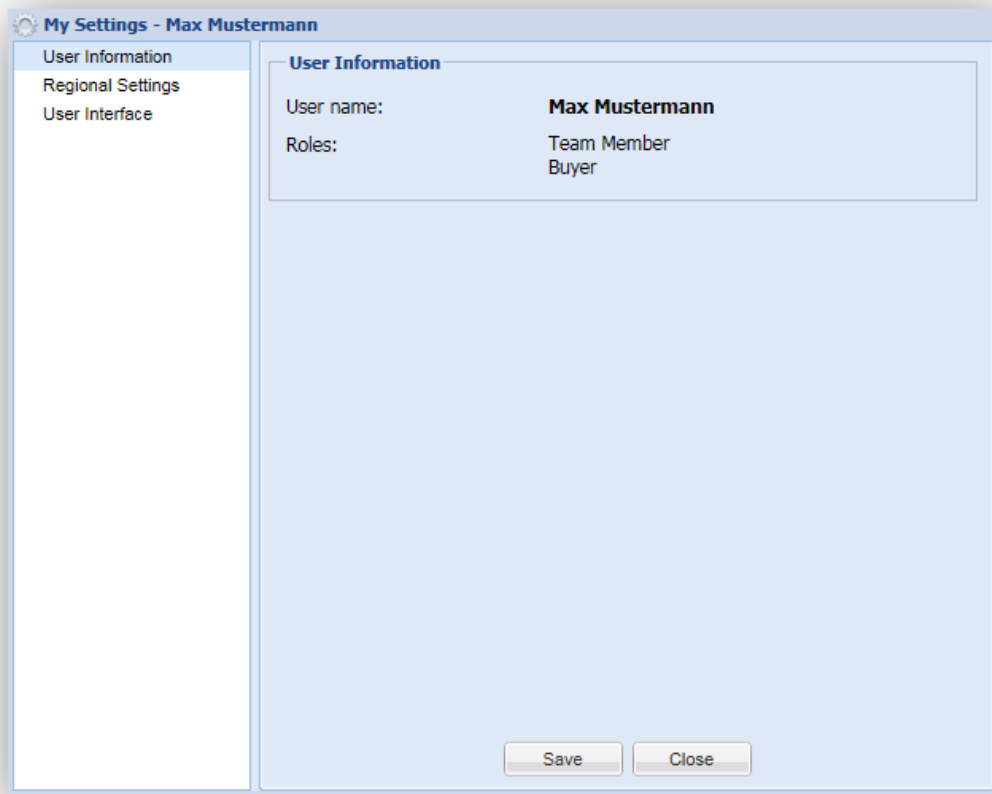
After having selected "My Settings", a window opens as displayed by the following screenshots.

The first section "User Information" provides you with information about your assigned role, hereby indicating your access rights.
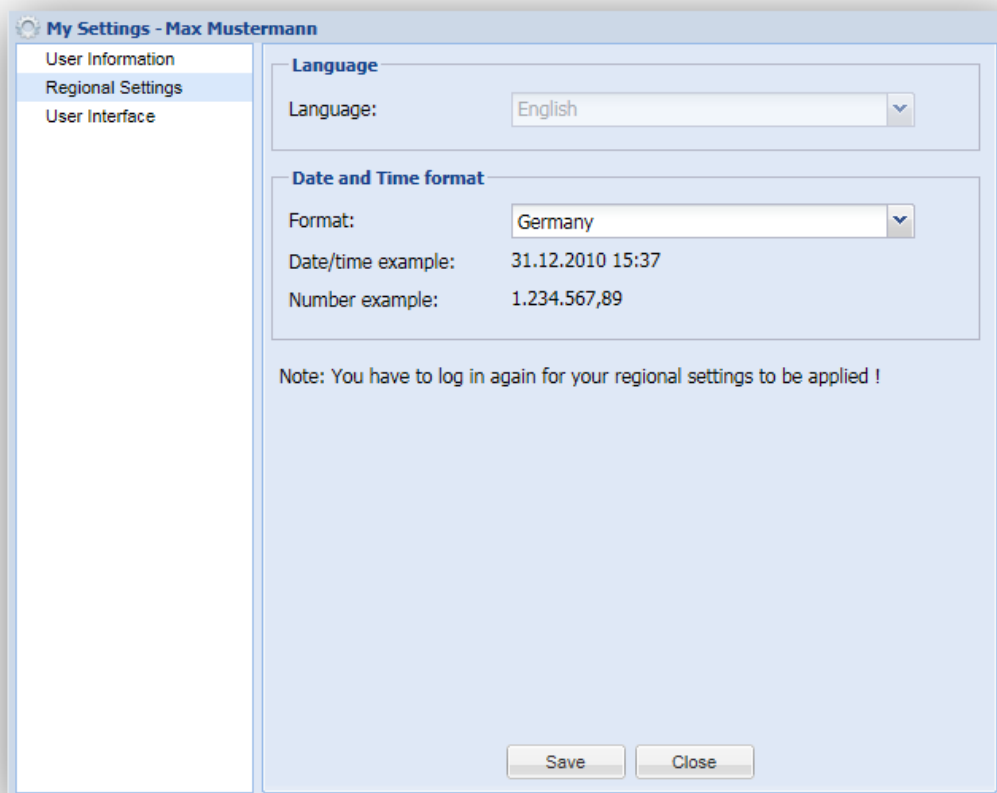
Within the second section you are able to select the language the application will be presented to you. English, French or German will be available, however only English is available at this time.

In addition, you can also choose your preferred date and time format. The time format for France, Germany, United States, United Kingdom and India are available.

After choosing your preferred language and time format click "Save". All existing labels will be adjusted as soon as you refresh your application.

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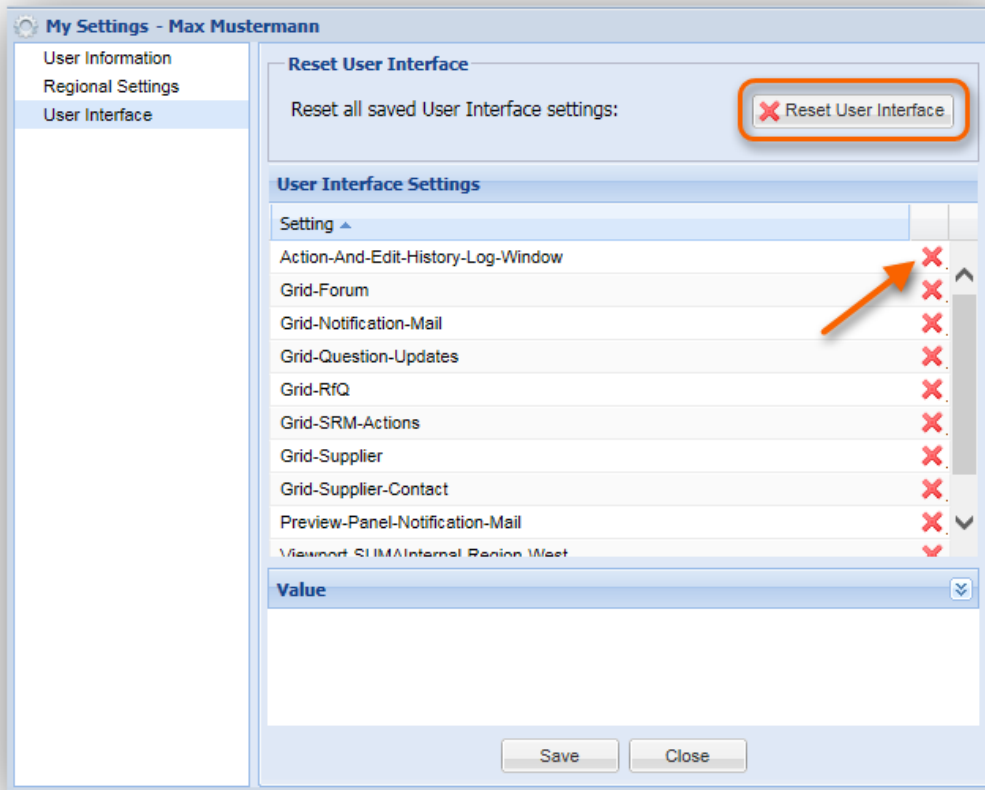
The "User Interface" section allows you to manage your personal settings. As indicated by the image above. You are able to reset all the personal settings and changes that you have selected or put in place for your personal user interface.

These setting could for example be the grid structure in your "Supplier" grid.

In order to remove specific customised settings and reset to the default value click the red cross of the respective setting as indicated in the screenshot.

Please be aware that if you click the button ✖ Reset User Interface outlined in the image, all personal customizations will be reset to default.

2.2   a. Supply management

Within the "Supply management" section you will be able to administer supplier and their supplier contacts, to execute audits and assign specific actions to supplier contacts. For more detailed information please refer to the following sub chapters.

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2.2.1 Supplier

To administer your suppliers select "Supplier" in the section "Supplier management" of the navigation pane. A grid with all your existing suppliers will then be displayed.
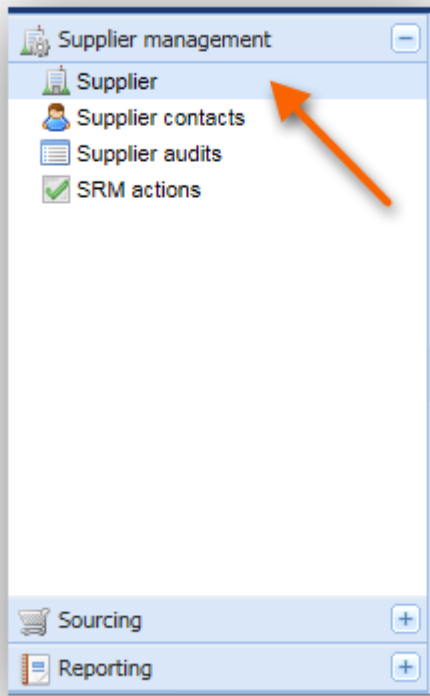
2.2.1.1 Create & update suppliers

In general any user with Buyer or higher privileges is allowed to create Suppliers in PIRS:Sourcing.

2.2.1.1.1 Creating a new supplier

To create a new supplier click the "New supplier" button in the top left corner of the "Supplier" grid.
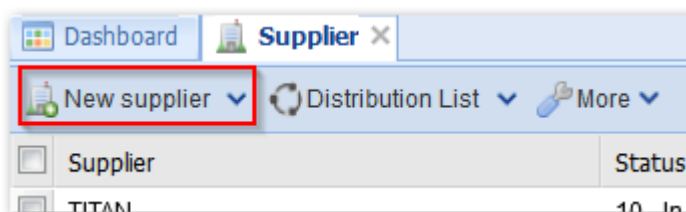
There are just a few mandatory fields that needs to be filled out:

2.2.1.1.2 Creating a new supplier from DUNS number
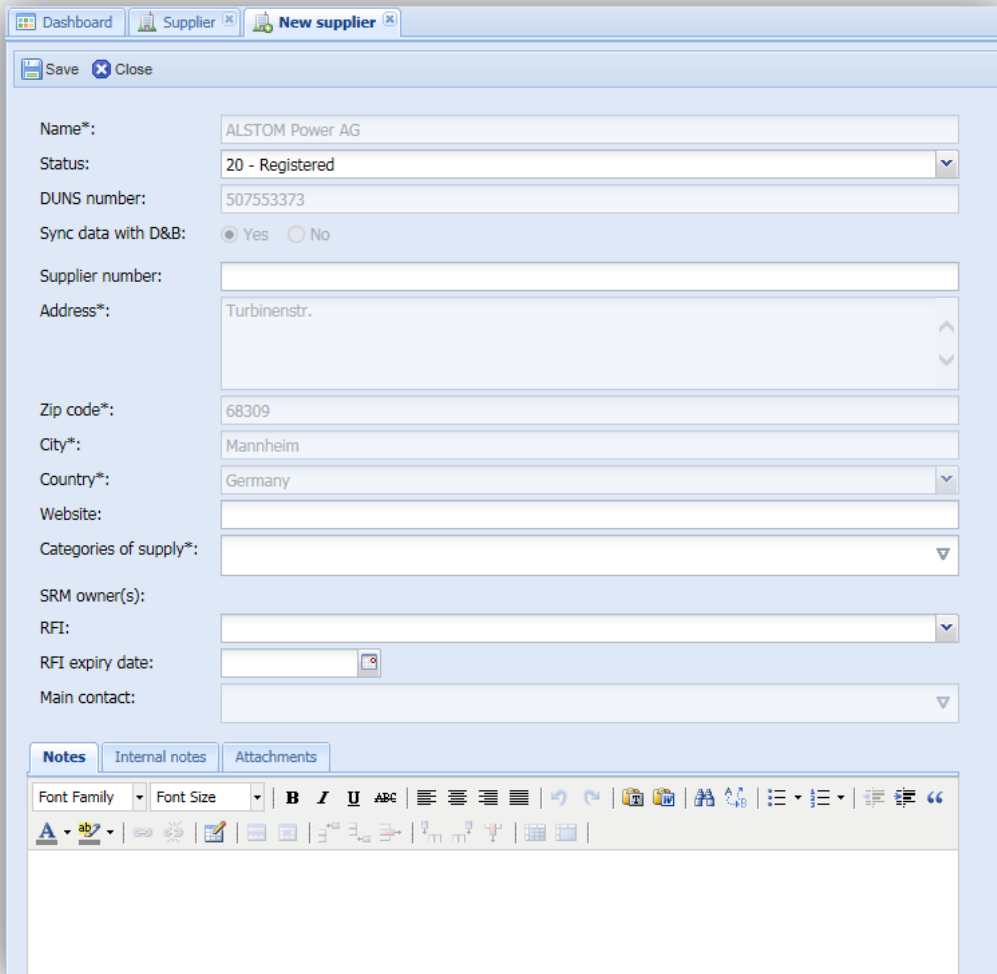
If available (and known) it is also possible to use the DUNS number to create a new supplier.

This is done by selecting following option in the menu:
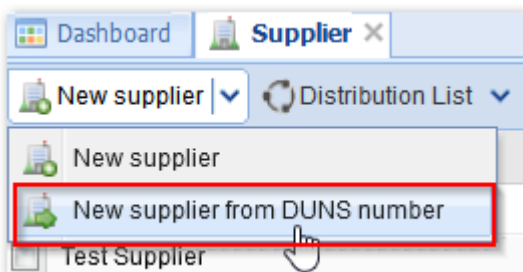
Enter the nine digit "Data Universal Numbering System" (DUNS)-number of the supplier you want to create within the appearing message box, and click "search". The application will establish a connection to D&B (Duns and Bradstreet) database and automatically fill in most of the data fields of the new supplier document based on the entered DUNS number.

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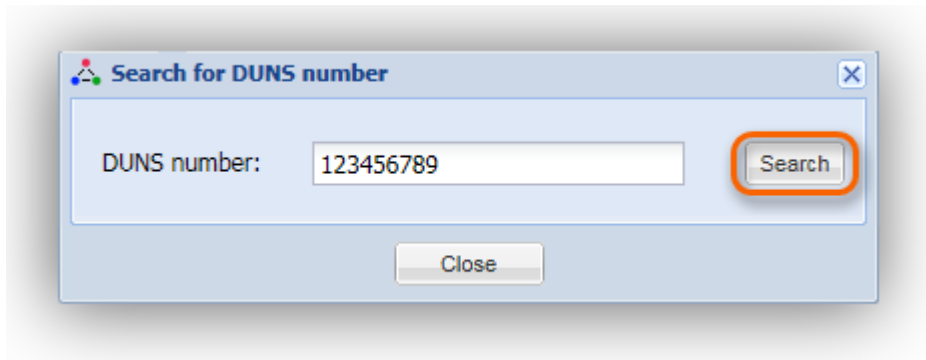
Most field values are automatically set based on the supplier DUNS number that was entered when the supplier document was created. Those field values can not be changed manually and appear in a light-grey writing in edit mode:

2.2.1.1.3 Edit and maintain supplier information

Status

The status indicates whether or not a supplier qualifies to take part in RFQ.

Only supplier with the status **30-Reviewed** or **40-Approved** or **50 - Partner** can be invited to an **RFQ**.

Please note: The status a company needs in order to qualify for an RFQ is defined and can be adjusted by your administrator.

Categories of supply

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Probably the most important field that has to be completed manually is the mandatory field "Categories of Supply".

Based on the selected categories of supply the "Supplier Relationship Management" (SRM) owner and SRM delegate are automatically allocated. The SRM owner and SRM delegate have the **exclusive right** to score the "Request for Information" (RFI), therefore the person(s) that is able to officially rate the RFI of this supplier will be indirectly defined by the categories entered here.

RFI

By choosing an RFI from the existing RFI templates you can assign an RFI to a supplier. The RFI can **only** be scored by the SRM Owner and SRM Delegate.

RFI expiry date

The expiry date indicates how long a scored RFI is valid.

2.2.1.1.3.1   Tabs for additional information

Notes and Internal Notes

Within these tabs you can enter and manage your remarks and notes about the supplier. The difference between "Notes" and "Internal Notes" is that the latter will **not** be visible by the supplier in the portal. Confidential remarks should <u>only</u> be included within internal notes.

Long term capability scoring (LCTS)

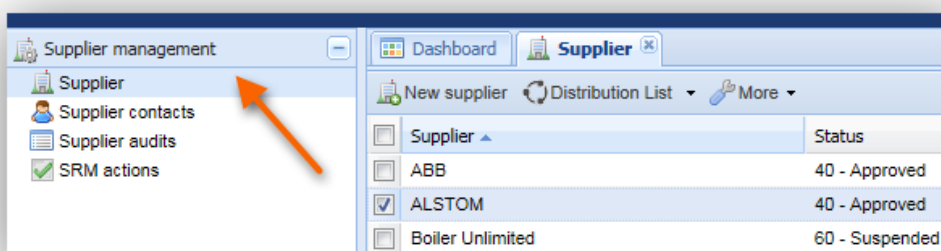Please note this tab will only be available if the RFI has been scored. Please refer to chapter Long term capability scoring (LTCS) for further information.

Attachments

This tab enables you to upload attachments.

2.2.1.1.3.2   Updating a supplier

To update an already existing supplier open the "Supplier" grid and double-click a supplier entry.

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The selected supplier document will now open in read mode. By clicking the "Edit" button in the top left corner the document will be opened in edit mode.
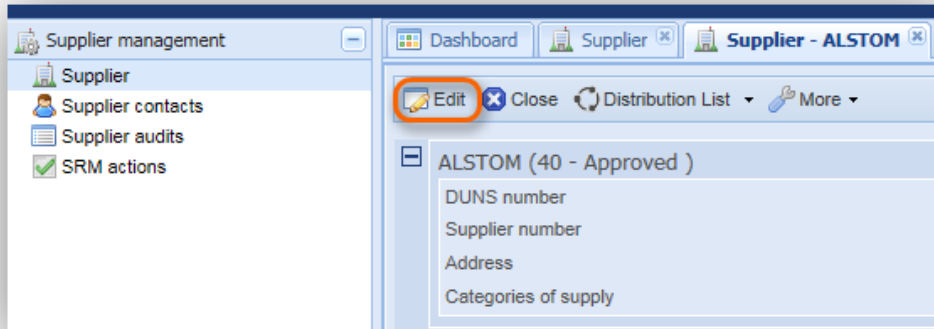
2.2.1.1.3.3 Actions offered in edit mode

Alongside the "Save" and "Close" buttons the application provides several additional features.
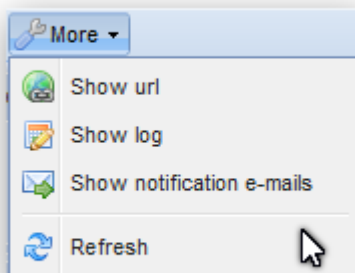

Distribution List:

Please refer to chapter Distribution List

More:

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

- "Show notification e-mails" shows all corresponding e-mails which relate to the selected document (please also refer to Show notification e-mails)

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2.2.1.2 Read supplier information

In order to read supplier information open the "Supplier" grid and double-click the supplier entry you are interested in. The document will open in read mode.
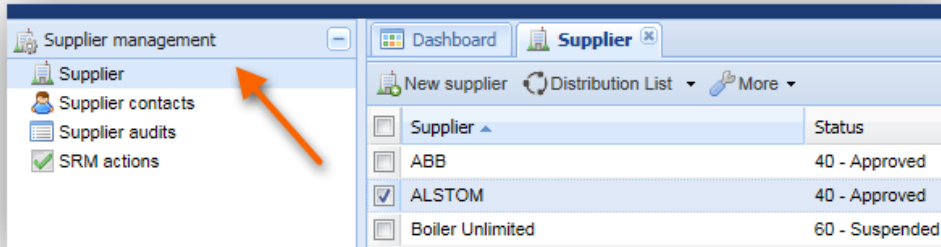
The supplier document in read mode consists of expandable sections containing all important information regarding a supplier. By collapsing/expanding sections using the ⊟ and ⊞ symbol in the left upper corner of each section, you easily access the information you need.

Supplier (Status)

Within the first section all general information about the selected supplier is maintained. Furthermore, it contains a direct link to the RFI of this supplier next to the supplier name in the top of the section.

Attachments

All files that have been attached to a supplier document will be listed in this section. All attachments can be opened and downloaded directly from within the supplier document.

Notes / Internal Notes

Notes are an additional way of sharing information with your supplier. Internal notes will not be transferred and shared with the supplier through the portal application. Internal notes are internal remarks.

Long Term Capability Scoring (LTCS)

This tab will only be available if the RFI has been scored. Please refer to chapter Long term capability scoring (LTCS) for further information.

Contacts

All registered supplier contacts of this particular company are are included in this section and can be open directly from within the document.

Quotations

Within the quotations section all quotations submitted by supplier contacts of this company are listed and linked.

Awarded Quotations

If any of the submitted quotations have received awards they will be included in this section.

Supplier audits

This section displays all the audits which have been performed for this supplier.

SRM actions

Please refer to chapter SRM actions

D&B information

The D&B section lists all the information regarding the selected supplier gathered by Dun & Bradstreet that has been received via D&B interface.

If you want to update this information the document needs to be in edit mode. Then you will have the option to update this section listed within your "more"-options. The last updated date and time will appear next to the section heading.

2.2.1.2.1   Actions offered in read mode

Alongside the well-known "Edit" and "Close" buttons the application provides additional functions within the action bar.
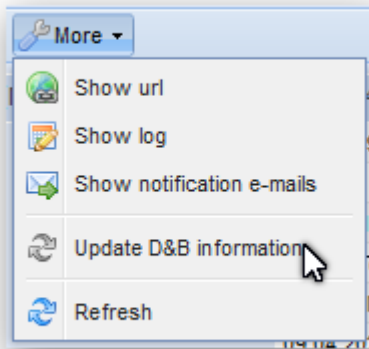
Distribution List:

Please refer to chapter Distribution List

More:

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

- "Show notification e-mails" shows all corresponding e-mails which relate to the selected document (please also refer to Show notification e-mails)

- "Update D&B information" will refresh the field values of the selected supplier in the D&B section using the D&B interface. Please be aware that this action may involve additional costs.

- "Refresh" will refresh the information displayed in the read mode

2.2.1.3 RFI - Request for information

How to assign an RFI to your supplier

An RFI is assigned to a supplier by selecting one of the available RFI templates within the supplier document in edit mode. You can only assign one template.
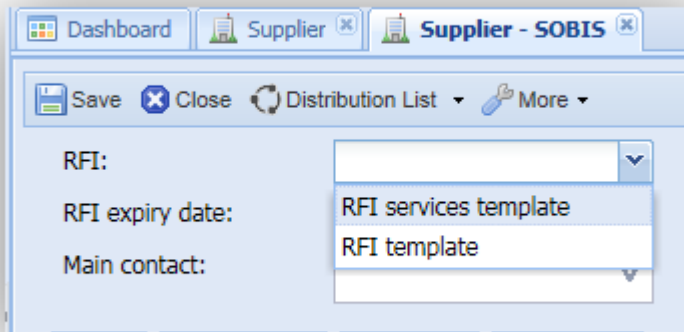
Please note: No automatic notification e-mail will be sent when an RFI is assigned. Every buyer is able to assign an RFI, there are no restrictions. However, scoring an RFI can only be performed by the responsible SRM owner or SRM delegate. To advise the supplier that an RFI is available for completion, access the supplier contact, edit and click "enable and send user credentials". An e-mail will then be sent to the supplier contact inviting them to complete the RFI.

How to score an RFI

As soon as a supplier contact has answered an RFI question the SRM Owner and SRM Delegate will be able to enter a score for this answered question, no matter if the RFI has been submitted or not. On the other hand marking an RFI as scored is **only** possible if the RFI has been submitted.
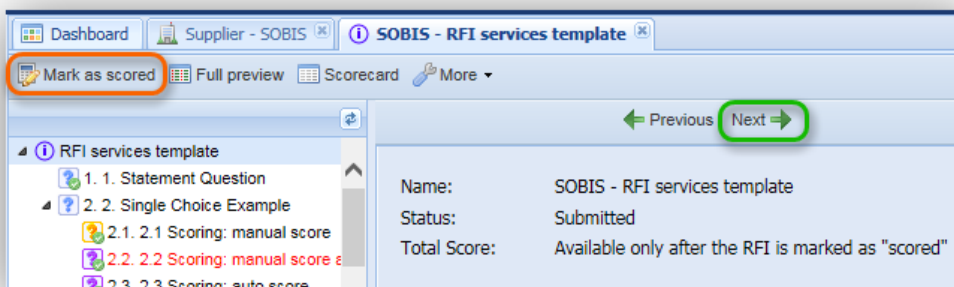
To score a question select the respective question in the navigation pane on the left hand side or click the "Next" button (highlighted green in the next screenshot) to go through the questions step by step.

In general, answered questions are displayed with a green check mark. While questions that require no scoring are indicated with the blue icon, those that require scoring are marked in orange and question that were already scored by will be marked in purple. Therefore the application uses following icon types to indicate the scoring process of an RFI:

- Question without scoring required: **blue icon**

- Answered question (without scoring required): **blue icon** with **green marker**

- Question with scoring required: **orange icon**

- Answered question with scoring required: **orange icon** with **green marker** .

- Answered and scored question: **purple icon** with **green marker**

Once a supplier contact has submitted an RFI the SRM owner and delegate are able to mark the RFI as scored by clicking the "Mark as scored" button outlined orange in the screenshot.

Please note: Questions of type "Statement" will always be displayed as answered! Only "marked as scored" RFI's are going to be taken into consideration for the calculation of the LTCS points for the supplier.
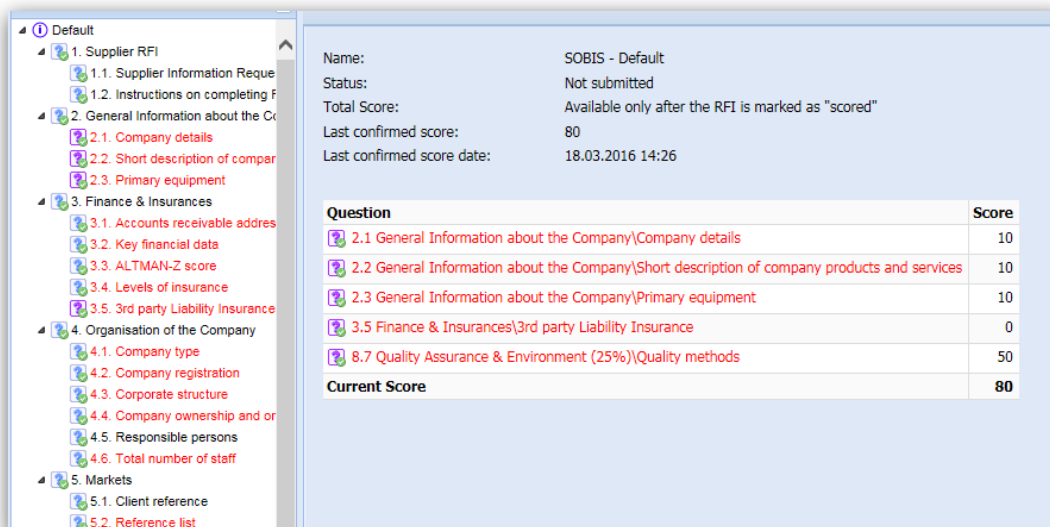
Internal explanation are available in the internal application for each question. A scoring guide for each question can be defined in the RFI template or questionnaire template.
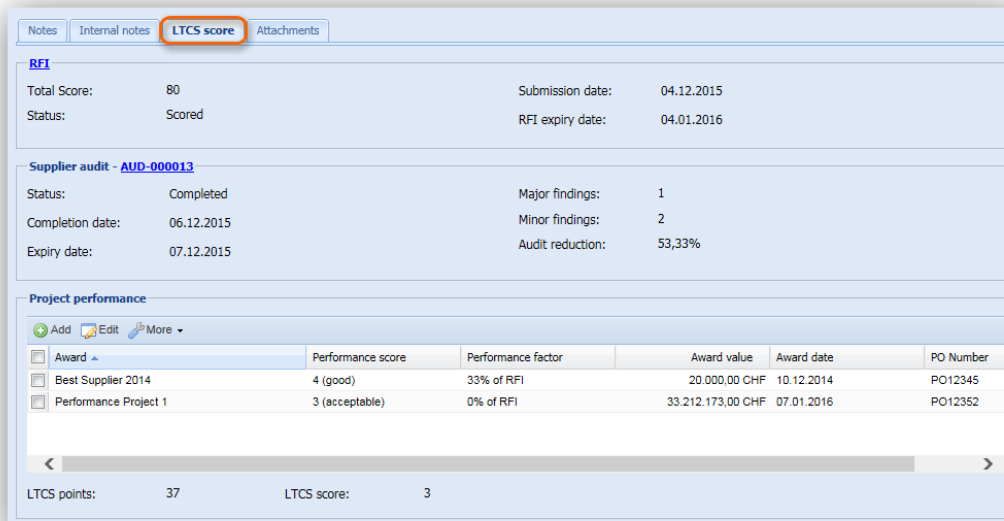
2.2.1.4 Long term capability scoring (LTCS)

Long term capability scoring is used to assess and score the performance of each supplier.

Generally, the management and calculation of supplier capability is based on:

- RFI score

- Supplier audits

- Project Performance (Manual) (awards from past projects)

- Project performance (Auto) (Rating of current RFQs)

The LTCS score is based on **RFI score**, **supplier audit** and **project performance (Manual and Auto)** evaluation following a simple equation:

RFI score - major/minor findings in supplier audit results - / + project performance (Manual and Auto)

RFI score

A scored RFI is the basis for calculating the LTCS score, therefore an RFI must be submitted and marked as scored before the LTCS is available. Please be aware that an RFI which has been scored but has no valid score at the moment e.g. because of modified questions or change in scoring that has not been confirmed yet, will also be taken into consideration. For this case the "last confirmed score" is used for calculation.

In this specific case, the LTCS tab of the Supplier will display the "last confirmed score" value within the "RFI Total Score" field even though the RFI status is unconfirmed. In addition to the outdated RFI score value the date of this latest confirmed score will be displayed.

Supplier audit results

The RFI score will be reduced by **the findings in audit results** counting:

- - 33% per major finding

- - 10% per minor finding.

    Only the audit documents with status **completed** are used for the calculation.

    If there are multiple audit documents with status completed the application will use the audit document with the **latest expiry date.**

    The final LTCS score does not require an audit result, therefore it is also calculated if no audit is available!

Project performance

    The RFI score is also reduced or increased by **project performance results.**

- Long term project performance and time limit**:**

    By default, only project performances of the last 3 years are taken into consideration. The time period can be modified by adjusting the application setting "supplier.maxageforlongtermprojectperformance" accordingly.

- Weighted Average:

    For the calculation of the overall project performance the scoring is weighted following this formula:

- Weight calculation:

    X = performance score

    g = award value

- Rounding:

    The weighted project performance score is rounded by 0,5 post decimal position.

- For example:

- 1,249 is rounded to 1

- 1,250 is rounded to 1,5.

- Performance Factor:

    Every weighted and rounded project performance score must match the performance factors shown in table below.

Performance score factor/LTCS adaptor	Performance
1 (very poor)	-66%
1.5 (poor - very poor)	-50%

2 (poor)	-33%
2.5 (poor – acceptable)	-16.5%
3 (acceptable)	0%
3.5 (acceptable – good)	+16.5%
4 (good)	+33%
4.5 (good – exceptional)	+50%
5 (exceptional)	+66%

The matching performance factors can be set in project keywords "Performance indicators".

Final LTCS score

The calculated LTCS points will be rounded to whole numbers. For example:

- 8,4999 is rounded to 8

- 8,5 is rounded to 9.

The points will be translated to sores as shown in the table below.

For bids the following scores are used in the award system.

LTSC points	Score
0 or less	0
01-20	1
21-40	3
41-60	5
61-80	7
81-100 points	10
> 100 points	10

2.2.2   Supplier contact

To administer your supplier contacts select "Supplier contacts" in the section "Supplier management" of the navigation pane. A grid with all your existing supplier contacts will then be displayed.
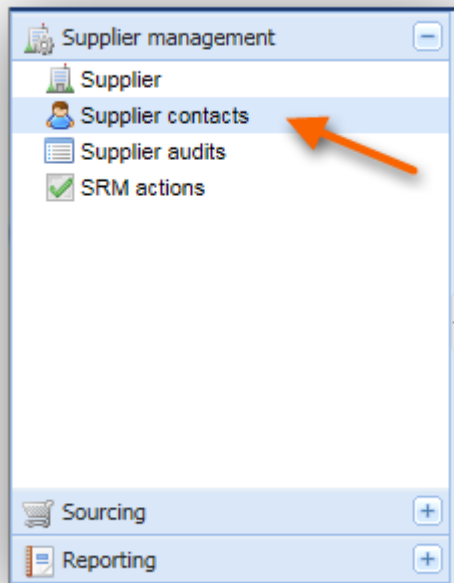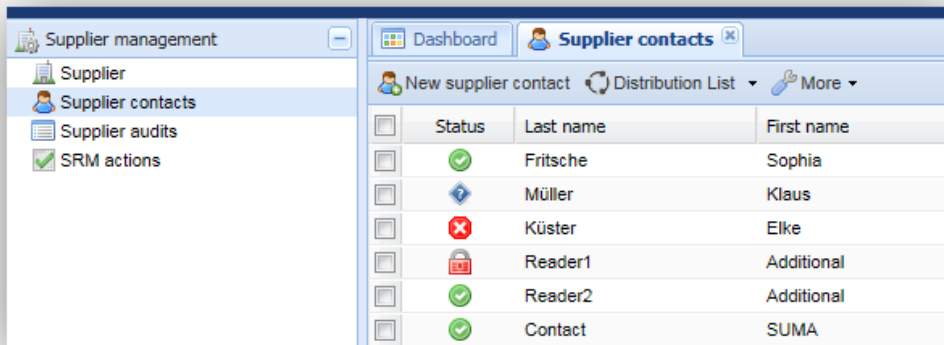
2.2.2.1 Create & update supplier contacts

2.2.2.1.1   Enable/Disable self-registered supplier contacts

When a supplier contact registered using the portal self-registration, his or her initial status will be "Access Requested". This initial supplier contact status is display within the contact grid using a question mark (   ).

To open a contact document in read mode double-click the respective entry within the grid. Afterwards you can switch to edit mode by using the "Edit" button.

In edit mode click "Enable & send user credentials" (green outline) in the action bar to confirm a supplier contact. This triggers an automatic e-mail to the supplier contact which contains the user name and a temporary password allowing access to the portal. It will also invite the supplier to complete the already selected RFI.

As soon as a supplier contact is enabled the icon in the "Supplier" grid will change to a green tick ( ).
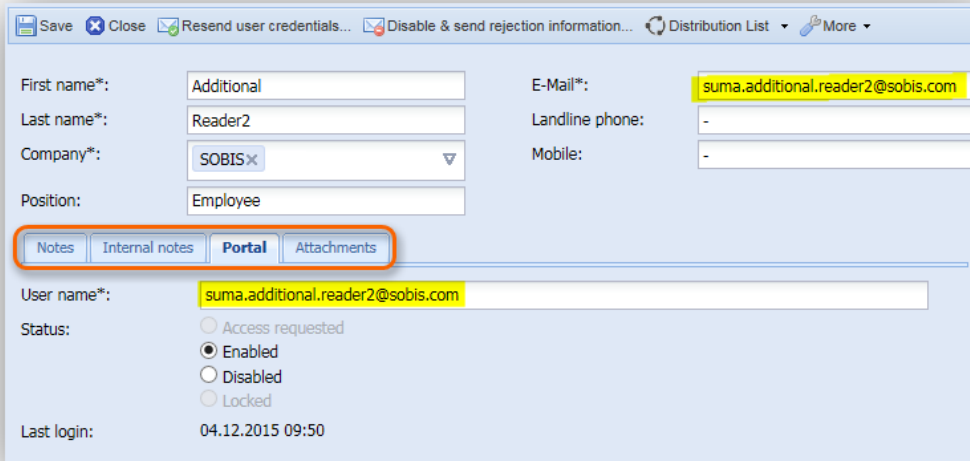
If you want to disable a contact and send the user a rejection information e-mail click "Disable & send rejection information" (see orange outline in the screenshot above). The icon in the grid will then switch to a red cross ( ).

If a contact has tried to log into portal with a wrong password five times he will be locked which is illustrated in the supplier grid by a red lock (

).

2.2.2.1.2   Additional value fields

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In addition to the header information there are various tabs in the supplier contact which allow you to add and maintain information about your supplier contact.

Notes and Internal Notes

Within these tabs you can enter and manage your remarks and notes about the supplier contact. The difference between "Notes" and "Internal Notes" is that the latter will **not** be visible in the portal. Confidential remarks should only be included within internal notes.

Portal

This tab summarizes the information of a supplier contact regarding his or her access to the portal. As you can see in the screenshot the E-Mail address of a contact is also used as a contact's user name in the portal. Please ensure that they have identical values.

Attachments

Additional files can be to uploaded within the last tab.

2.2.2.1.3   Actions offered in edit mode

Besides the "Enable" and the "Disable" options mentioned above and the well-known "Save" and "Close" function the application provides several additional features. Once you have sent the user credentials to the respective supplier contact the button "Resend user credentials...". This feature enables you to reset the password of this supplier contact and resend his new credentials together with a link to this supplier contact document in the Portal. The recipient is then able to, for example, change his contact information and retrieve his password information.
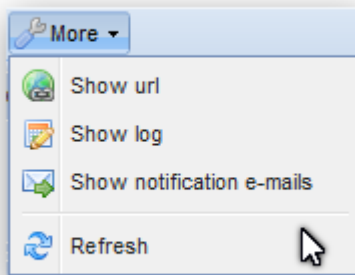
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Distribution List:

Please refer to chapter Distribution List

More:

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

- "Show notification e-mails" shows all corresponding e-mails which relate to the selected document (please also refer to Show notification e-mails)

2.2.2.2 Read supplier contact information

To open the supplier contact in read mode open the "Supplier contact" grid and double-click the respective entry.

The supplier contact in read mode consists of expandable sections containing all important

information regarding the respective contact. By collapsing/expanding sections using the

and symbol in the left upper corner of each section, you easily access the information you need.

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Supplier contact (e.g. Max Mustermann)

Within the first section all general information about the selected supplier contact is maintained.

Attachments

All files that have been attached to the supplier contact document will be listed in the second section. All attachments can be opened and downloaded directly from within the contact document.

Quotations

Within the quotations section all quotations submitted by this supplier contact are listed and linked.

Awarded Quotations

If any of the submitted quotations have received awards they will be displayed in this section.

SRM actions

Please refer to chapter SRM actions

Forum asked questions

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This section includes a list of all forum questions the supplier contact has raised in the forum of an RFQ.

2.2.2.2.1 Actions offered in read mode

Alongside the well-known "Edit" and "Close" buttons the application offers several additional features within the action bar.
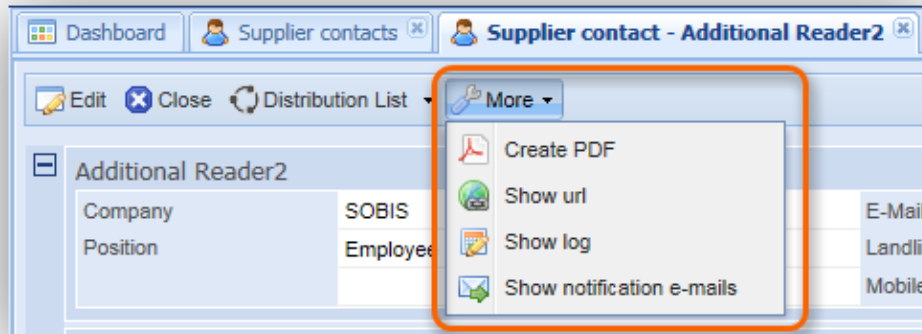
Distribution List:

Please refer to chapter Distribution List

More:

- "Create PDF" allows you to create a PDF file from the selected document (please also refer to Create PDF)

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

- "Show notification e-mails" shows all corresponding e-mails which relate to the selected document (please also refer to Show notification e-mails)
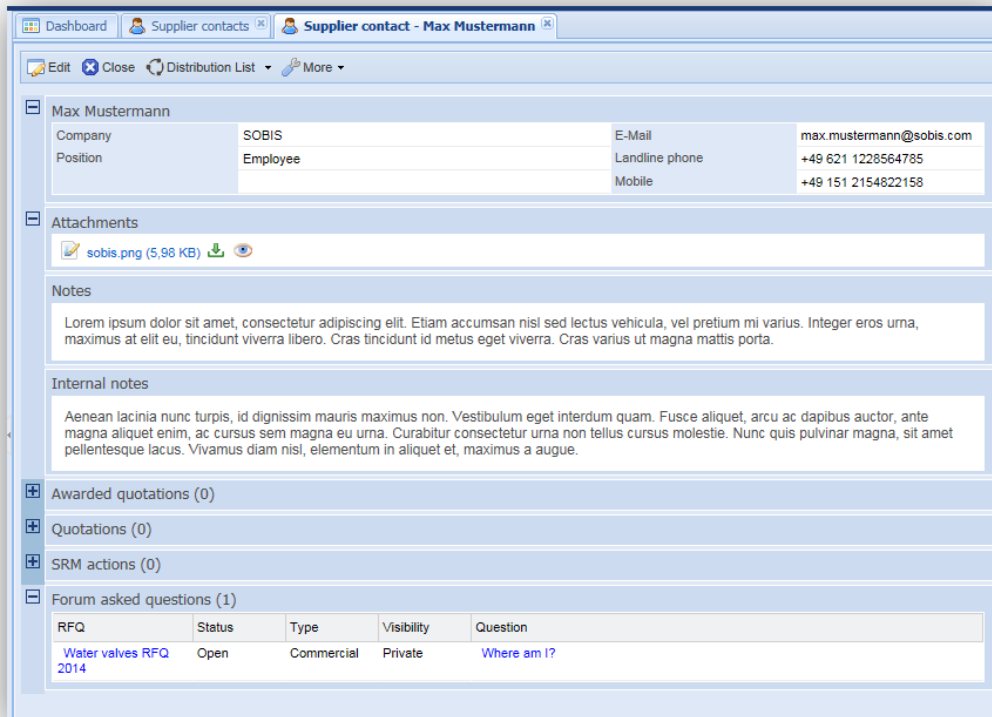
2.2.3 Supplier audits

Supplier audits are internal evaluations of preformed services. Values entered within a supplier audit will influence the calculation of the LTCS. However, only the last completed audit will be considered for the LTCS. To learn more about the calculation of the LTCS score refer to chapter Long term capability scoring (LTCS).

To review audit reports related to a supplier open the "Supplier audits" view in the "Supplier Management" section. Next, double-click the respective entry within the grid.

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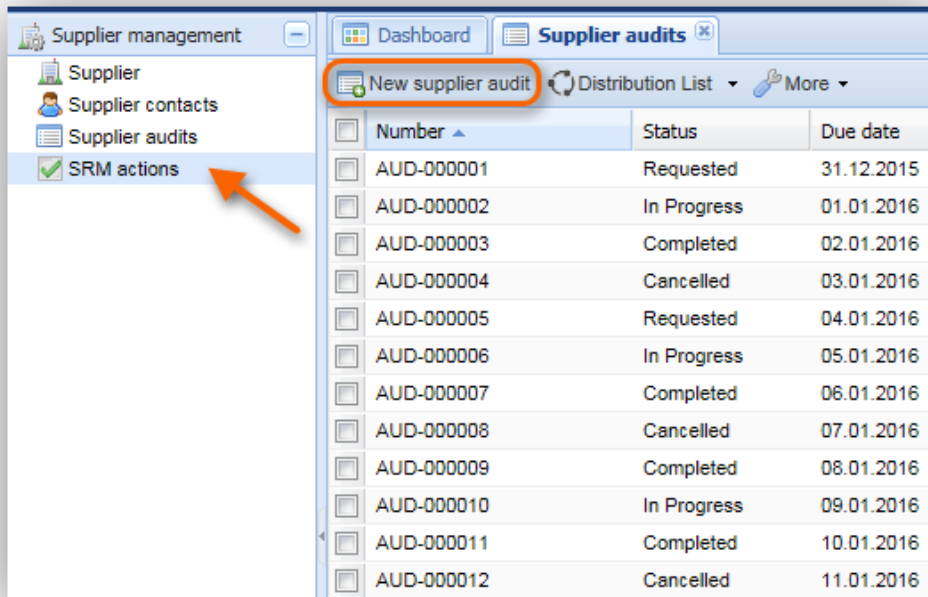
Create a new audit

Select "New supplier audit" outlined orange in above screenshot to create a new supplier audit. In general, all audits can only be created and edited by a defined group of people from the quality department. However, buyers are also able to create audit but they can only edit their own audit documents. Within the internal application buyers and attendees are allowed to read all audit documents.

Supplier contacts using the portal will also be able to access an audit document in read mode.

Please note: The person selected as "Auditor" of an audit document must have auditor rights to the application. You will therefore only be able to select the auditor from the user group of auditors.

You have the possibility to mark attachments as internal in the supplier audit document. The attachments marked as "internal" are NOT visible in the PIRS:Sourcing Portal application for your supplier.

Supplier audit document in the PIRS:Sourcing portal application:

2.2.3.1 Actions offered in read mode

Alongside the option to save or close a supplier audit document the action bar offers several additional functions.

Distribution List:

The Distribution List will be used for all communication regarding a supplier audit. Please refer to chapter Distribution List

More:

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

2.2.4   SRM actions

SRM actions are specific tasks you can assign to your supplier contacts and internal users and manage within your internal application.

Create a new action
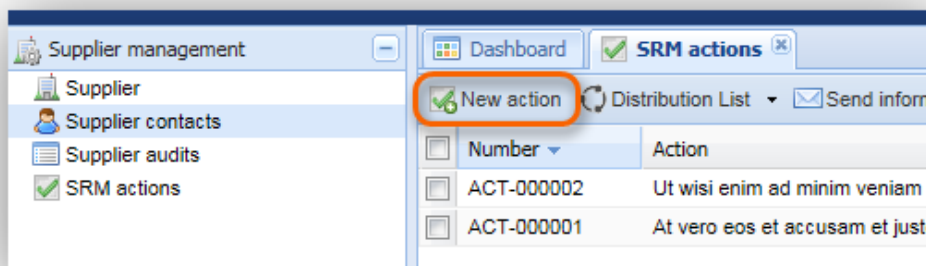
In order to directly assign specific tasks to a supplier contact open the section "Supplier Management" and select "SRM actions".

Next click the "New Action" button on the left hand side of the grid action bar and a new SRM action document will open in a new application tab.
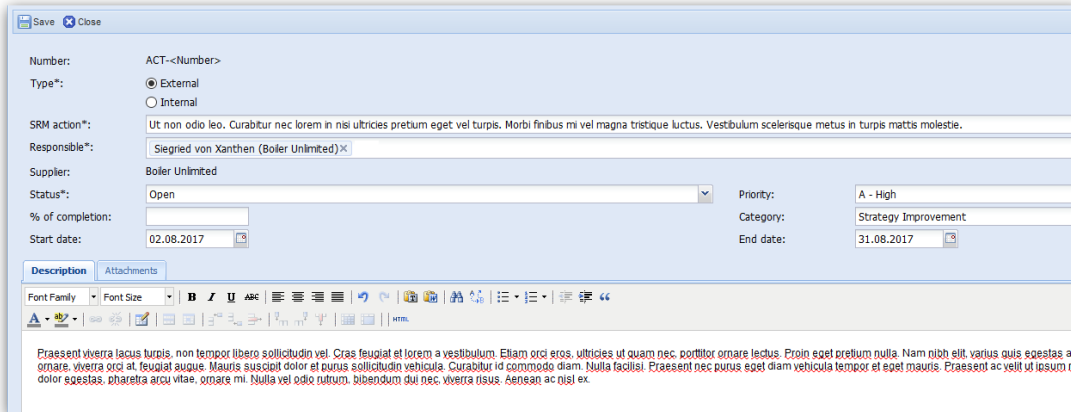
There are several mandatory fields for which you have to enter or select a value before a new action can be sent to a supplier contact. Mandatory fields are marked with a * symbol.

To create and save a new action you need to enter an action title, define a status and assign the task to a specific supplier contact.

Optionally, you can also define a priority, a category, percentage of completion as well as a start and end date. As soon as you save the new SRM action it will be automatically transferred to the Portal.

In addition to a detailed description, you are able to upload files that will also be transferred to the Portal once you save the SRM action.

The user can use the function to create a batch of SRM actions. If more then one supplier is selected, the batch mode will automatically be triggered.

Additional a warning message for the creator of the SRM action is provided.

Supplier contact/buyer should be able to request the closure of a SRM action. There will be no restriction based on the status of the SRM action (Open or Closed), the request for closure can be created several times for one SRM action.

All requests for closure will be shown in the SRM action (the date of closure, the comments entered on closure and the attached files).

The request for closure cannot be modified after being submitted (neither in the internal application nor in the portal application).

If supplier contact is required to provide additional information to be included in the request for closure, he/she will create a new request for closure.

The requests for closure are displayed in a separate section (read mode - internal application and portal application)/separate tab (edit mode - internal application) of the SRM action document.

The most recent request for closure is listed first.

Comments are mandatory and attachments not. Attachment upload should support drag and drop. The comments and attachments are not going to be send in the request for closure notification (e-mail received by SRM owner and SRM delegate).

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2.2.4.1 Actions offer in SRM actions

Alongside the well-known "Save", "Edit" and "Close"-buttons there are several additional options offered within the action bar.

In order to inform the supplier contact about the assigned task it is recommended that you send an information e-mail by clicking the "Send information e-mail" button which will appear right after the document has been saved. Please keep in mind that only the SRM owner, the SRM delegate or a user with administrator rights will be able to send an information email.
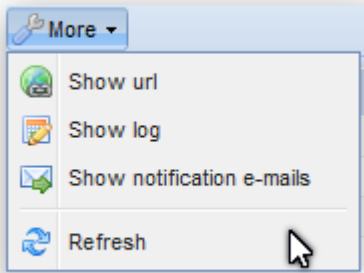
Distribution List:
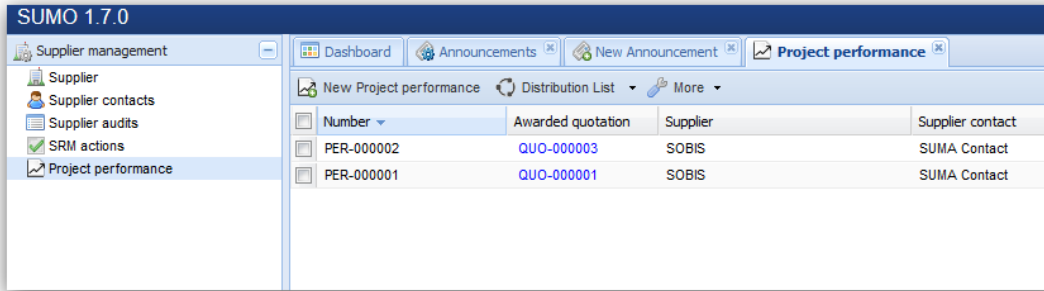
Please refer to chapter Distribution List

More:

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

- "Show notification e-mails" shows all corresponding e-mails which relate to the selected document (please also refer to Show notification e-mails)

2.2.5   Project Performance

The section "Project performance" is part of the "Supplier management" area and gives the possibility to analyse the LTCS (Long Term Capability) for one or more suppliers.

LTCS is calculated based on the RFI, Audit, the Project Performance (Manual) and the Project Performance (Auto) information created in PIRS:Sourcing based on awarded quotations.
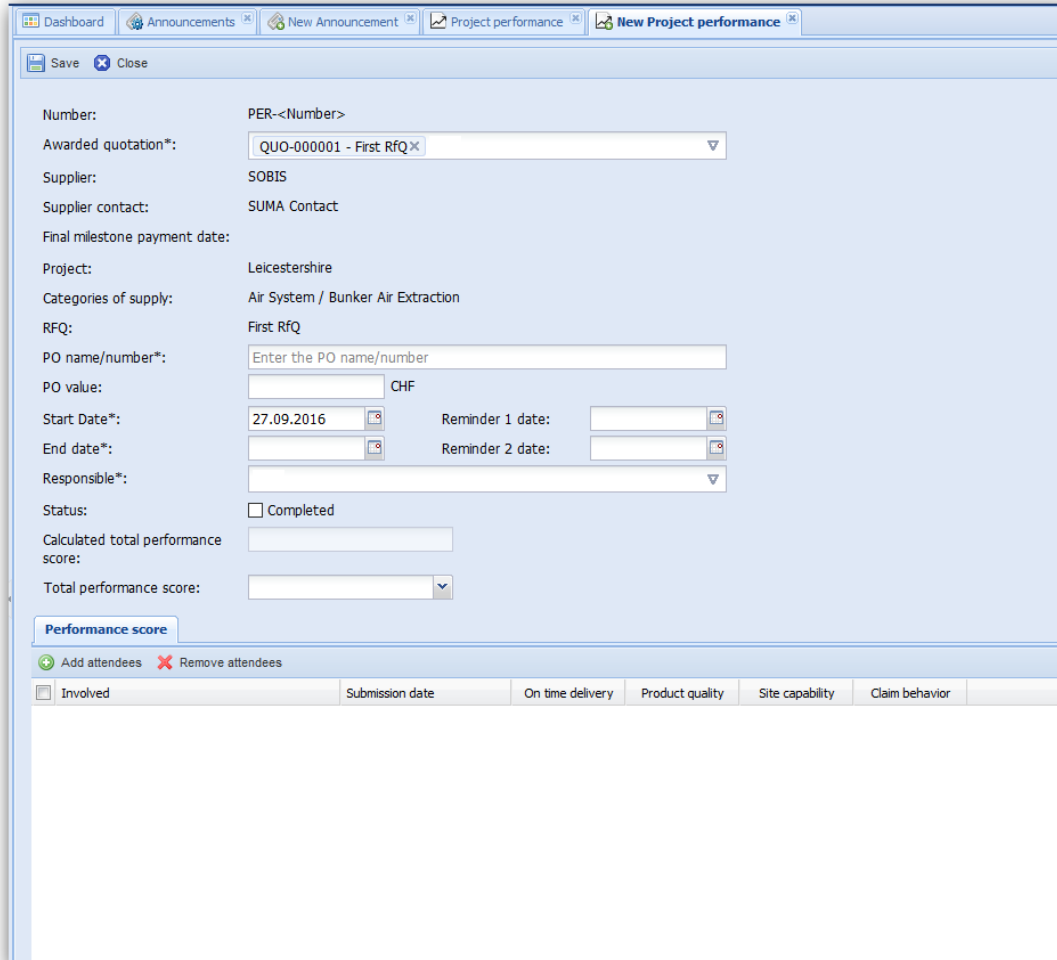
The project performance document has an awarded quotation as a base. PIRS:Sourcing users are invited to attend the project performance evaluation. By using the "Add attendees" button, internal PIRS:Sourcing users are invited to attend to the evaluation of a supplier's project performance. Once an attendee has been added, A e-mail with a link to the project performance questionnaire will be sent.

The invited PIRS:Sourcing users will evaluate the supplier project performance by answering 4 questions (This is only possible between start and end time of the evaluation).

Should the PIRS:Sourcing user not complete the evaluation, two reminders will be sent (reminder date is defined by the creator)

The responsible buyer will close the project performance evaluation via action in PIRS:Sourcing and confirm the total project performance score (Mark status of document as "Completed").

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All invited users have to answer four fixed questions to calculate the performance score of the supplier:

- On time delivery

- Product Quality

- Site capability

- Claim behaviour

  Following answers are possible:

- 1 = very poor

- 2 = poor

- 3 = as contractually agreed

- 4 = good

- 5 = exceptional

Number:	PPQ-000001
Involved:	Admin, SUMA
Awarded quotation:	QUO-000001
Supplier:	SOBIS
Supplier contact:	SUMA Contact
Project:	Leicestershire
Categories of supply:	Air System / Bunker Air Extraction
PO name/number:	121 AB
PO value:	125000
Start date:	17.09.2016
End date:	31.12.2018

	very poor (1)	poor (2)	acceptable (3)	good (4)	exceptional (5)
On time delivery:	⦿	◯	◯	◯	◯

Please consider the following elements: delivery to side, completion of installation, provision of documentation, others (e.g. spares / commissioning)

Product quality:	◯	⦿	◯	◯	◯

Materials, site works, documentation, others (e.g. spares / commissioning)

Site capability:	◯	◯	⦿	◯	◯

Personnel & qualifications, supervision, language / local requirements, cooperative approach to work, health & safety performance

Claim behaviour:	◯	◯	◯	◯	⦿

Unfair or invalidated claims - 1, fair & reasonable claims - 3, no claims or highly cooperative - 5

Additional comments - please provide an explanation for scores that are either very poor (1) or exceptional (5):

The invited PIRS:Sourcing user should answer the evaluation questions and save & submit their responses. With "Save and submit", an e-mail is sent to the responsible person of the project performance and the project performance score will be calculated. The submission and calculation of project performance score is done only between the start date and end date of the project performance.

The implementation of the project performance allows the calculation of the LTCS based on RFI, audit and project performance evaluation:

- RFI Score

- Reduced by audit results

    o - 33% per major finding

    o - 10% per minor finding

- Reduced / increased by project performance

    o 1 (very poor) -66%

    o 1.5 (poor - very poor) -50%

    o 2 (poor) -33%

- o 2.5 (poor – acceptable) -16.5%

- o 3 (acceptable) 0%

- o 3.5 (acceptable – good) +16.5%

- o 4 (good) +33%

- o 4.5 (good – exceptional) +50%

- o 5 (exceptional) +66%

Only the latest audit document (audit date) available within the application is used for the calculation. The total project performance is calculated by the available project performance documents within the last 5 years weighted by the awarded quotation values. Long term capability scoring (LTCS)

PIRS:Sourcing users, with no regularly/daily access to the application should be able to see their open project performance in a widget "My not answered PP questionnaires"
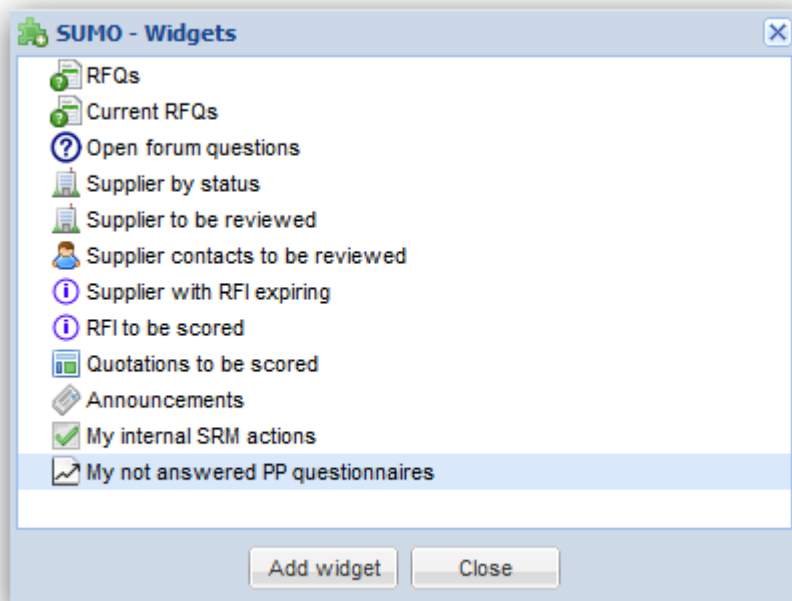
2.3   b. Sourcing

This section enables you to create Request for Quotations (RFQs) for projects and invite supplier contacts to quote. By inviting supplier contacts you allow them to place a bid. Furthermore you will be able to further communicate with the supplier contacts using the RFQ specific forums.

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2.3.1 Projects

To find the a list of all projects that are included in the application go to the "Sourcing" section and click "Projects" as shown in the screenshot.
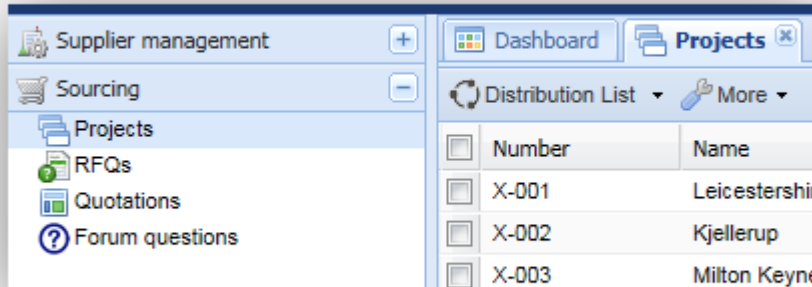
Only application administrators have the right to create and update projects. However, buyers, delegates and managers are be able to view all listed projects and read the project information. To open a project document in read mode simply double click the respective entry within the grid.The expandable sections offer all project information within the application.
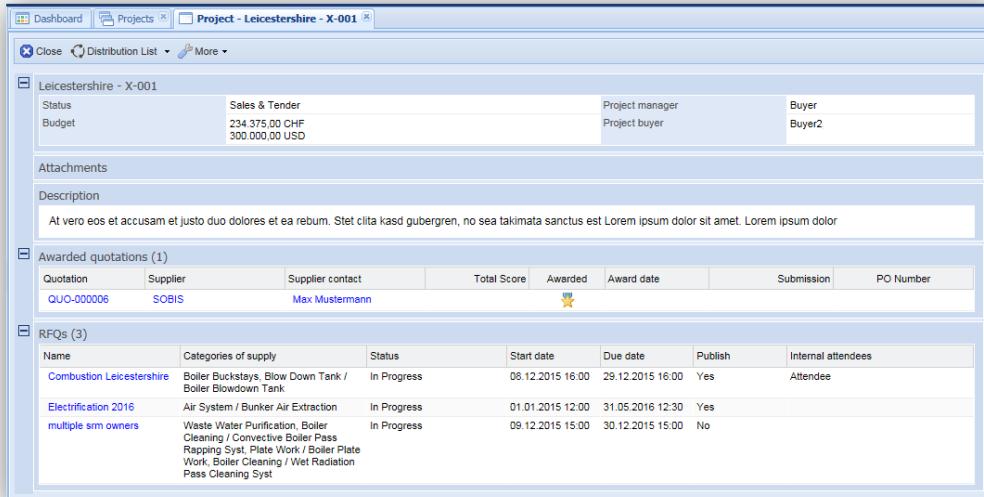
2.3.2 RFQs

2.3.2.1 Create and update an RFQ

To create and update RFQ's select "RFQs" in the "Sourcing" section of the application and click the button "New RFQ" highlighted in the screenshot below.

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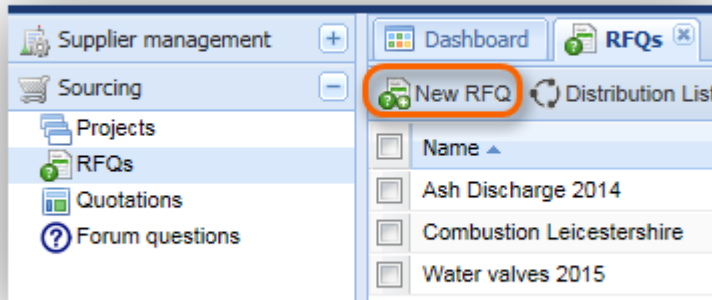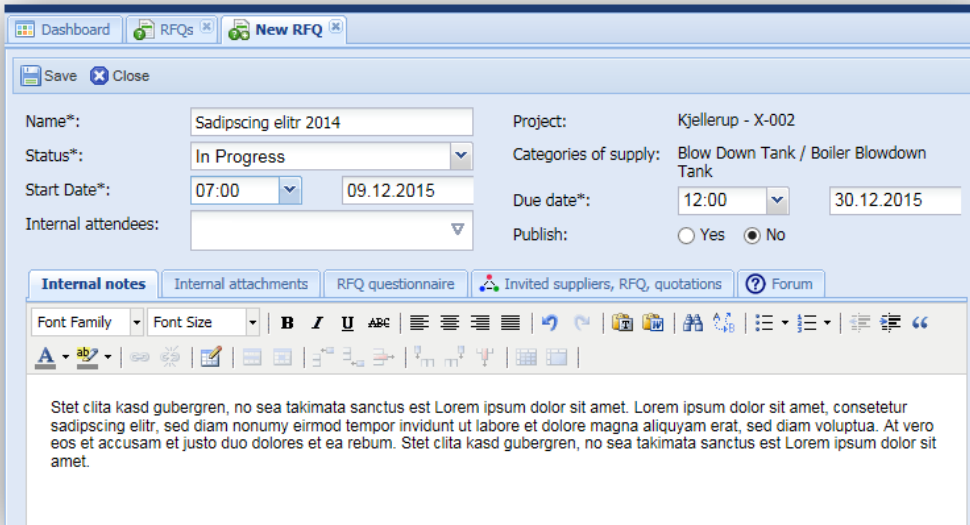
Select a project for the RFQ to belong to and the categories of supply within the appearing message box and click "Create RFQ".
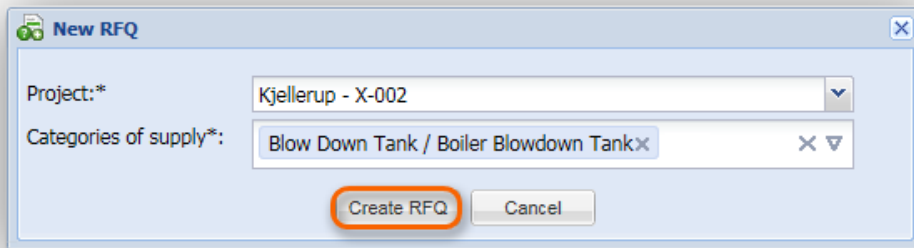
2.3.2.1.1 Header information

The new RFQ opens in a new application tab as shown in the screenshot below. All mandatory fields marked by the * symbol must be filled in. Please enter a value for name, status as well as start and due date.

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Internal Attendees

By adding users who have attendee access to the application within the "Internal attendees" field you enable the selected users to not only read this specific RFQ but to also upload internal attachments using the "Internal attachments" tab.

Publish

By default the value of "Publish" is set to "No". When selecting "Yes" the RFQ will be visible for invited supplier contacts in the Portal application.

2.3.2.1.2   Additional information within tabs

Internal Notes

Here you can add internal remarks which will only be shown to user within the internal application. The information will however not be transferred to the Portal.

Internal Attachments

Within this tab user with the necessary access rights (Project Manager/Buyer, RFQ Creator, SRM Owner/Delegate of category of supply and internal attendees) will be able to upload attachments. Internal attachments will also not be transferred to the Portal application.

RFQ Questionnaire

Please refer to chapter RFQ questionnaire

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Invited Supplier, RFQ, quotations

Please refer to chapter <u>Invited suppliers, RFQ, quotations</u>

Forum

Within the forum all questions posted by supplier contacts while attending to this RFQ are listed and can be answered. In order to answer or edit a question double click the entry. Refer to chapter <u>Forum questions</u> for more information. You will also be able to create a new forum question by clicking the "New forum question" button highlighted in the screenshot below.
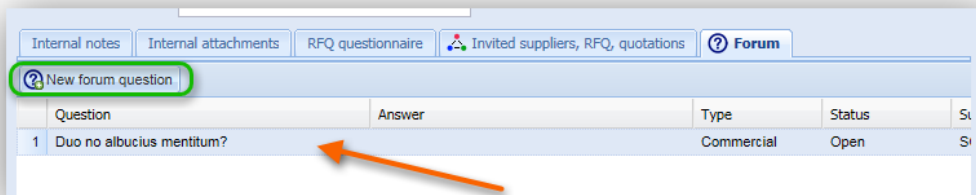
Please note: When creating a new question within the internal application a notification e-mail will be sent to all enabled and invited supplier contacts of this RFQ.

2.3.2.1.3   RFQ Questionnaire

Within the tab "RFQ questionnaire" you are able to create a questionnaire which will be filled out by invited supplier contacts.There are two ways to create a new questionnaire. You can either create a new document or you can create a questionnaire based on an existing RFQ template.

In order to use a template click the "Copy & Replace from questionnaire template" button and select a template from the list. Please be aware that if you have already created questions for your RFQ and then decide to use a template, all previously created questions will be deleted and can not be restored.

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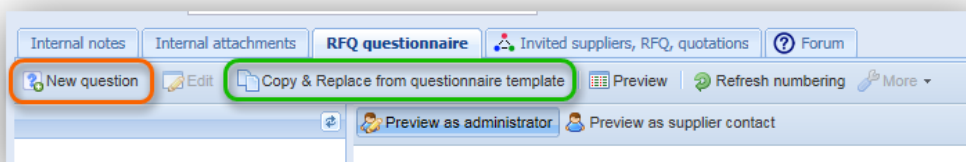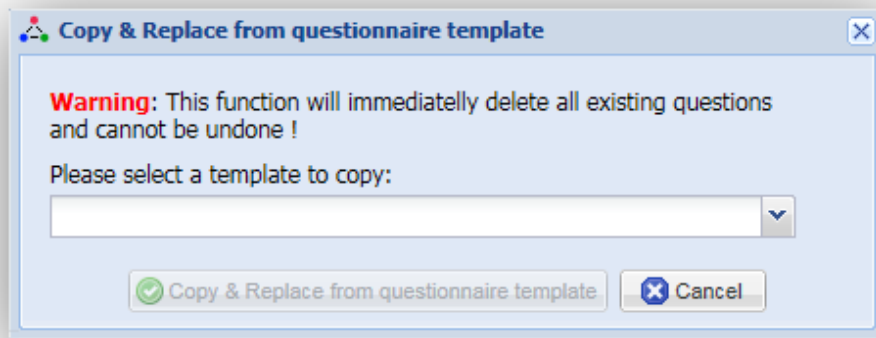
2.3.2.1.3.1   Create new RFQ template from scratch

To create an RFQ questionnaire from the start, click the "New Question"button in the top left corner.

A new window will appear allowing you to specify your first question.

There are two mandatory fields you need to define in order to save a question: Title and Type. The title will be listed as header of your question. With the type you indicate the way a question will be answered by the suppliers.

Note: Please make sure that you have saved the new RFQ before adding a new question or copying and replacing from a questionnaire template.

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For every question except the statement questions you are able to define scoring type, select whether or not this question is mandatory, and needs to be answered by a supplier contact, and if the supplier will be allowed to include additional comments for the answer.

Scoring

The scoring defines if and how the given answer of a question will be scored internally. So, by defining the scoring type you indicate the manner in which an answer by the supplier will be valued internally.

If no scoring is required for a question please select **"No scoring"**.

By selecting **"Manual scoring"** you define that this question can only be scored manually by the internal responsible person(s).

To automatically score an answer based on the choice the supplier contact has made select **"Auto scoring"**. This option is only available for question types where the supplier contact has to choose his answer from a predefined list of options (Single/Multiple choice questions). The score an answer option will receive can be defined when adding a new possible answer value. Please note that you are able to define a score and score explanation when adding a

new value even if you have chosen manual scoring. But in this case the scoring will not be set automatically. Refer to the respective question type explanation below for further information.

Generally, scoring will be done numerically. If you don't want to give a numerical score and instead would like to enter a text value, please select **"Free Comments"**

Mandatory

In case it is essential to receive an answer for a specific question select "Yes" and the supplier contact will be required to answer the question before being able to submit the RFQ. Questions marked as mandatory will display the title in read.

Allow additional comments

By enabling this option you can give your supplier contacts the opportunity to include comments or remarks in addition to answering the question.

Following, all available question types will be explained.

"Statement" Question

This question type requires no answer by the supplier contact. Therefore, it can be used to define the conditions the supplier contact has to follow when participating in this RFQ.

Add your text in the description tab and upload the file you like to share with the suppliers within the "Attachments". Unlike the "internal attachments" mentioned the above files attached to a question will be transferred to the Portal and can be downloaded by supplier contacts.

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Preview in the Portal:
The button "Preview as supplier contact" gives you an impression how the question you created will be displayed for a supplier contact in the Portal application.

"Single Choice" Question

A single choice question allows you to give supplier contacts a number of possible answers. The supplier will only be able to choose one of the offered values as an answer.

To add a new answer option click the "New Value" button highlighted in the screenshot. An additional window will appear which will give you the opportunity to add a value, a score and a score explanation for a new possible answer.

The order of the values listed as possible answers can be rearranged by clicking the downward/upward pointing green arrows located on the left hand side of the value grid. To delete a possible answer click the red X as shown in the following screenshot.

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Preview in the portal:
The following screenshot gives you an insight on how a single choice question will be presented within the Portal application.
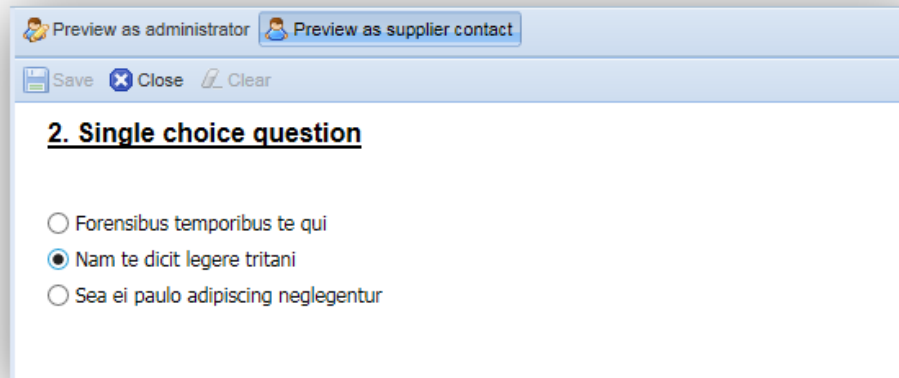
"Multiple Choice" Question

A multiple choice question has the same set up as the single choice question. Scoring, comments and mandatory options as well as the adding and management of the available answers are administered in the same way as described in the single choice question section.

Unlike the single choice question however, this type of question will allow the supplier contact to select multiple values as an answer. (Please see screenshot of the Portal preview)

Preview in the portal:
The following screenshot gives you an insight on how a multiple choice question will be presented within the Portal application.
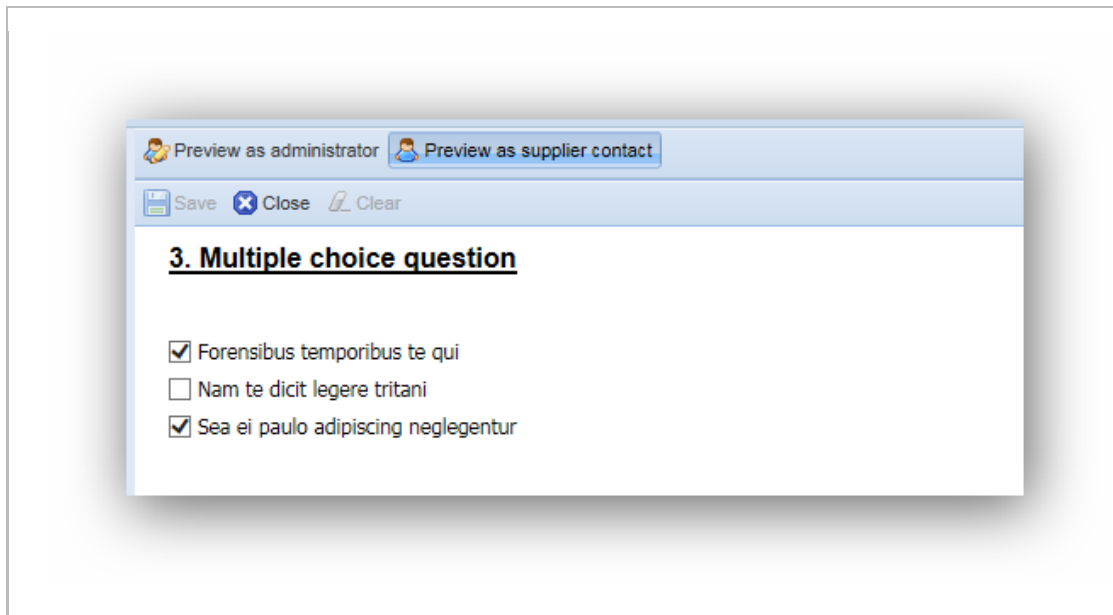
"Free text" Question

The free text question type allows your supplier contact to manually enter an answer as response to your question.

Similar to the statement question type, the free text question type allows you to upload files regarding the question that will be transferred to the Portal.

Preview in the portal:

The following screenshot gives you an insight on how a free text question will be presented within the Portal application.
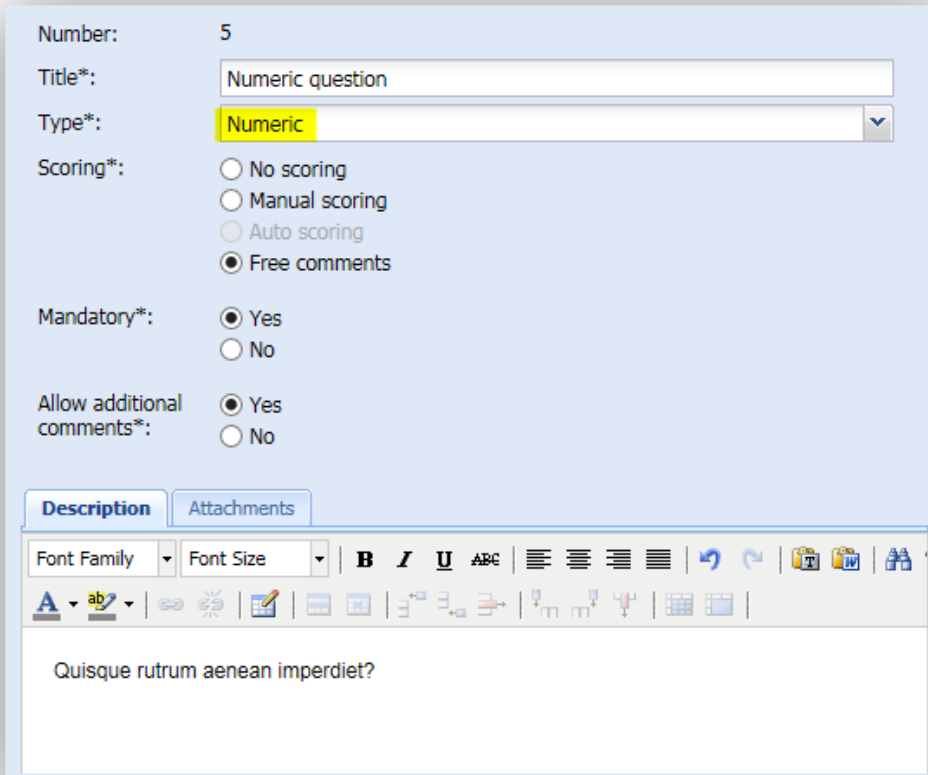
"Numeric" Question

A numeric question predefines the answer format. It requires the supplier contact to enter a number as his answer. This type could for example be used for financial questions.

This question type also allows you to attach files regarding the question that will be transferred to the Portal.

Please note: The option "Auto scoring" is not available for this type of a question.

Preview in the portal:

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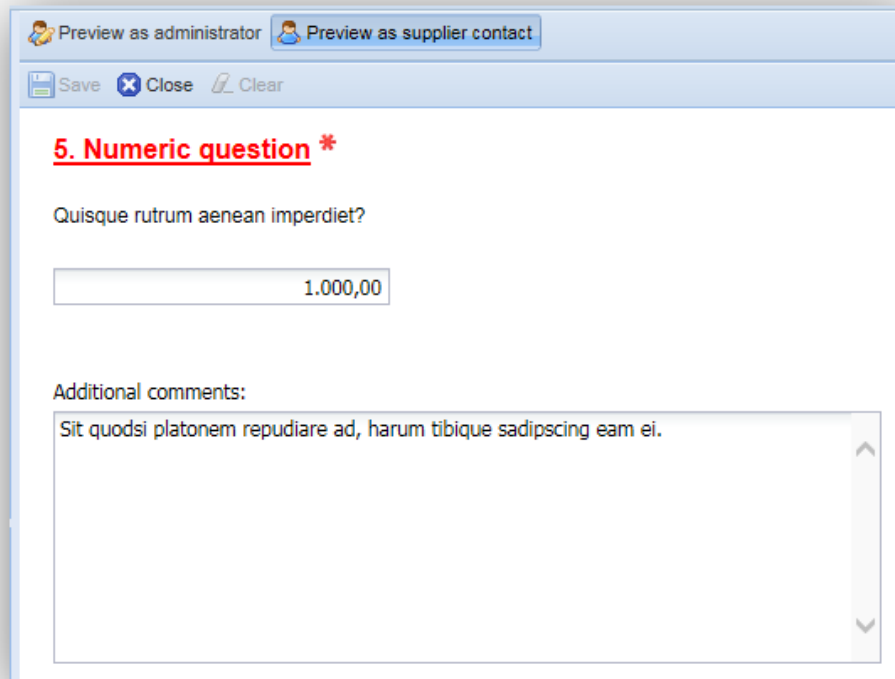
The following screenshot gives you an insight on how a numeric question will be presented within the Portal application.

Please note: The title of this question is displayed in red, as it was defined as "Mandatory"

"Date" Question

Similar to the numeric question this type of question also defines a specific answer format to be used by the suppler contact. It requires the supplier contact to enter a date as an answer.

This question type allows you to upload files regarding the question that will be transferred to the Portal.

Please note: The option "Auto scoring" is not available for this type of a question.

Preview in the portal:

The following screenshot gives you an insight on how a date question will be presented within the Portal application.
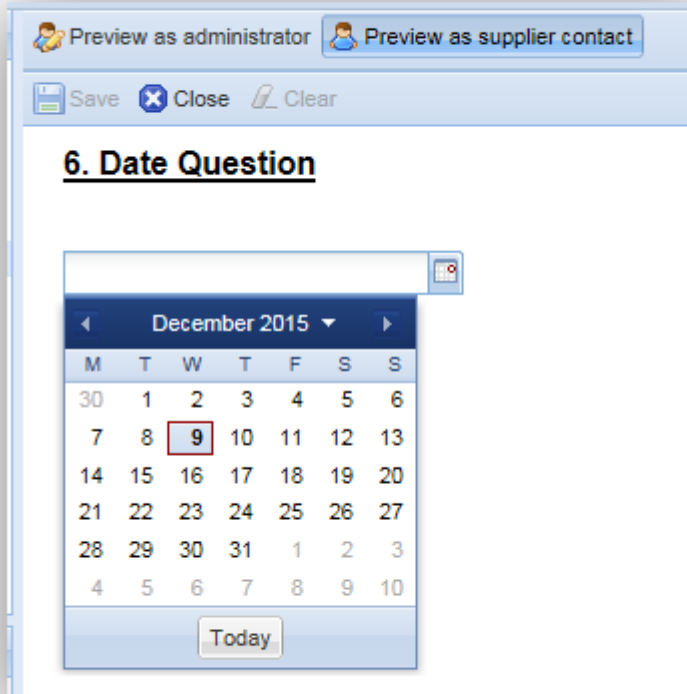
"Simple table" Question

A "Simple table" question allows you to combine several related questions in a table. All entered questions will be listed and arranged according to your entered values which allows supplier contacts to answer the related questions in one setting with a logical structure.

Supplier answers will be entered by the supplier contact as free text for each listed question individually.

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Preview in the portal:
The following screenshot gives you an insight on how a simple table question will be presented within the Portal application.
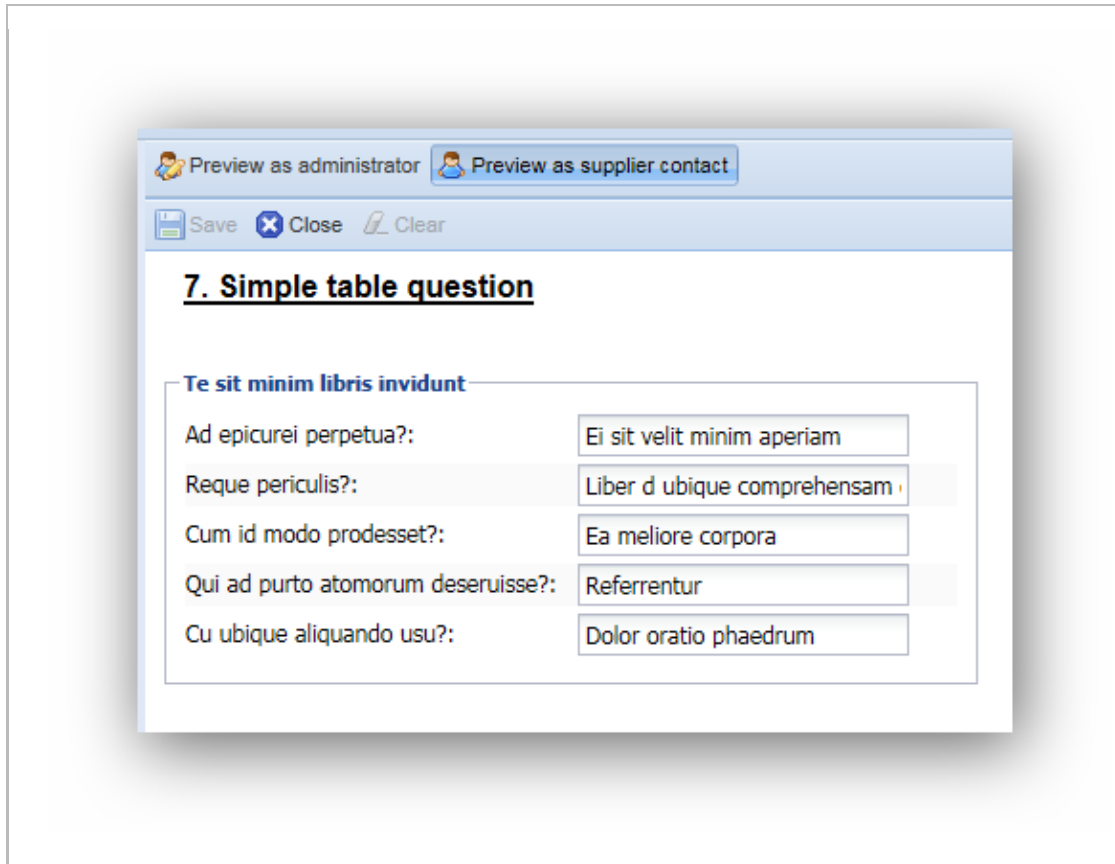
"Table" Question

A "Table" question allows you to combine several related questions in a table with a maximum of 3 columns and a maximum of 11 rows. All entered questions will be listed and arranged according to your entered values which allows supplier contacts to answer the related questions in one setting with a logical structure.

Supplier answers will be entered by the supplier contact as free text for each listed question individually. Please note that, if you make this question mandatory, the supplier will need to add a response to each and every box in the table.

Preview in the portal:

The following screenshot gives you an insight on how a table question will be presented within the Portal application.

"File upload" Question

Where the answer from the supplier contact requires an uploaded attachment, e.g. an official document or certificate, the file upload question type should be selected.
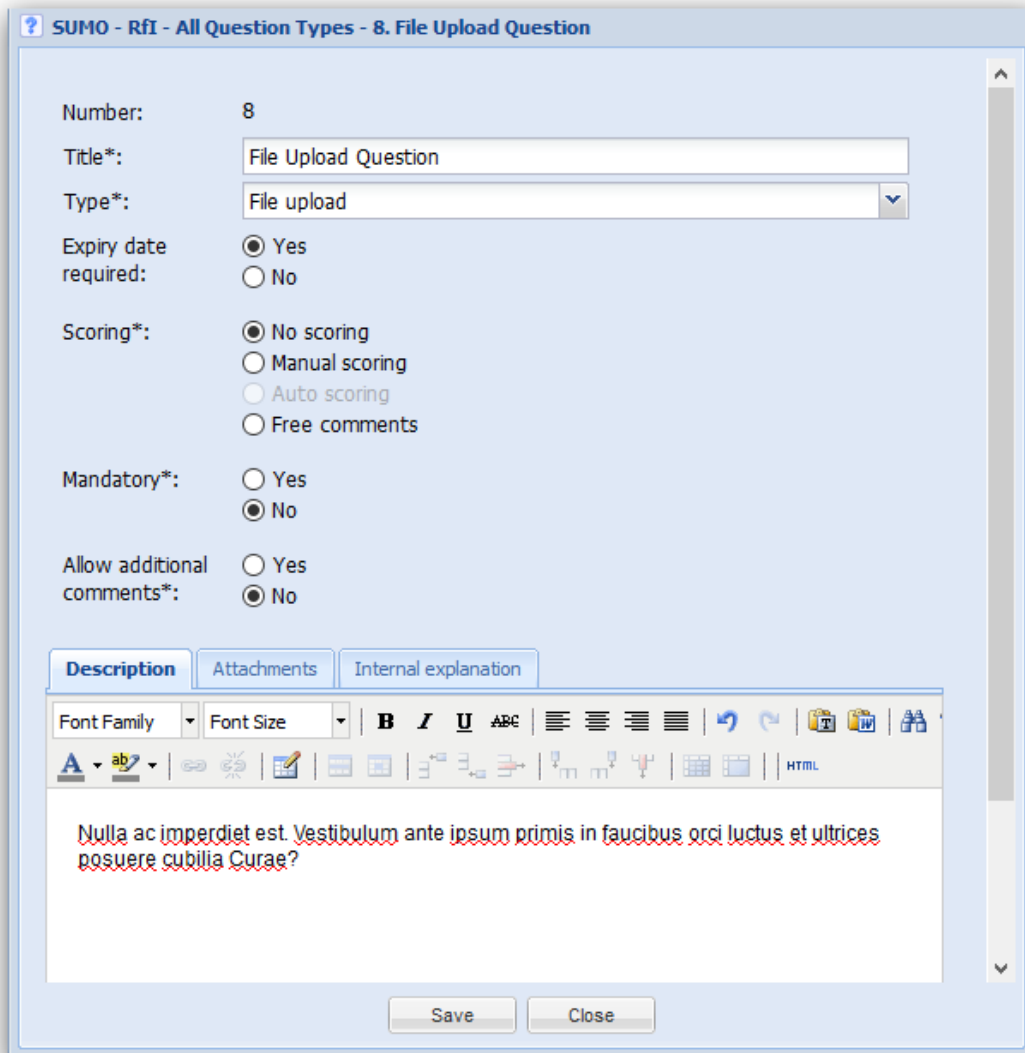
Please note: The option "Auto scoring" is not available for this type of a question.

If the expiry date is set as required, the supplier contact is forced to enter this date, if a file is uploaded. The next expiry date from all questions type file uploaded is calculated and visible in the supplier document and supplier grid.
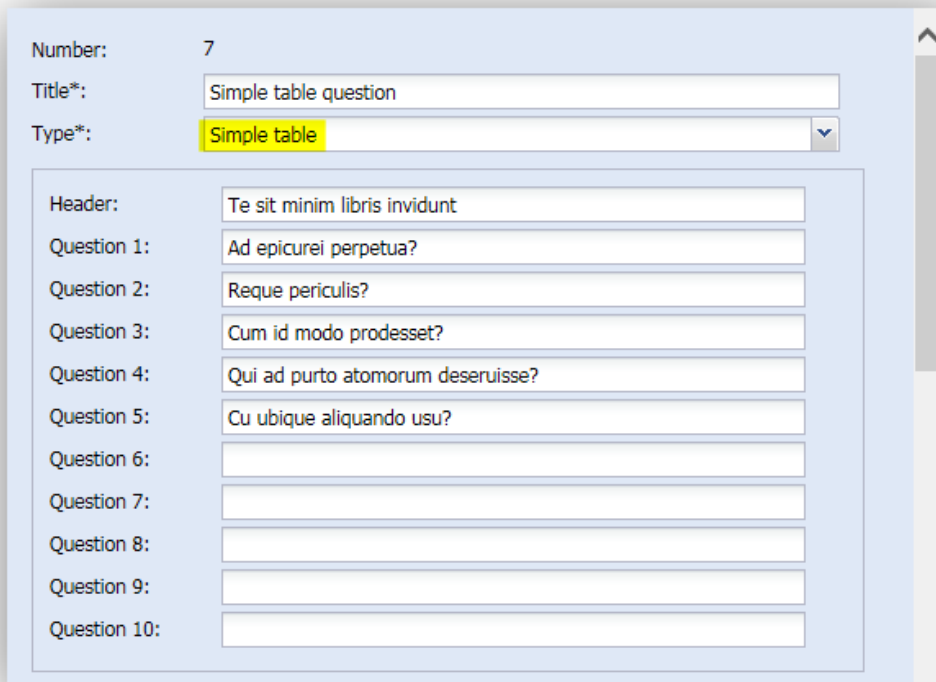
Preview in the portal:

The following screenshot gives you an insight on how a simple file upload question will be presented within the Portal application.
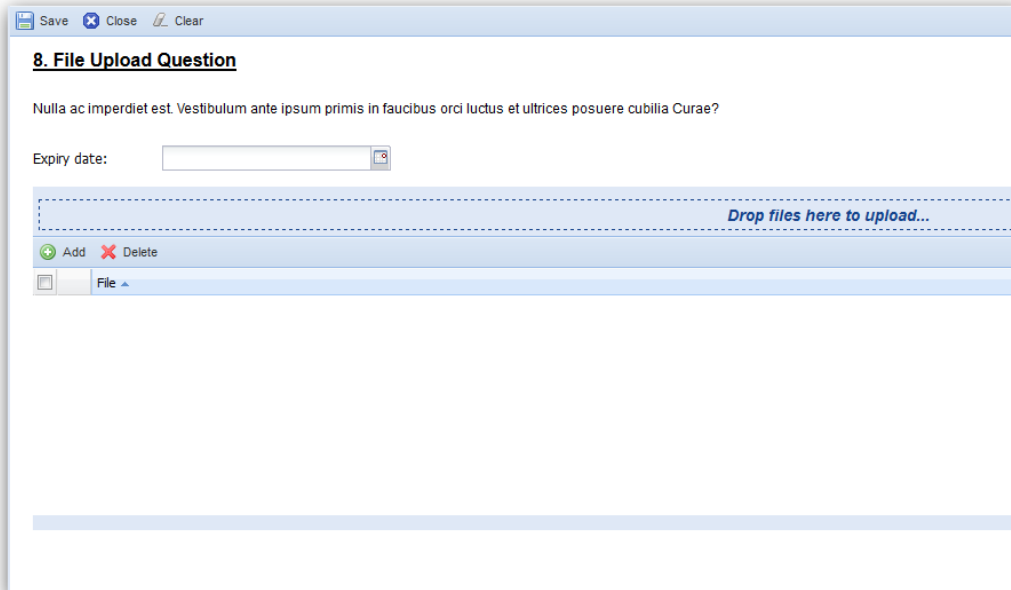
2.3.2.1.3.2 Edit a question

To edit a question double-click the respective question entry or select a question and click the "Edit" button (see screenshot).
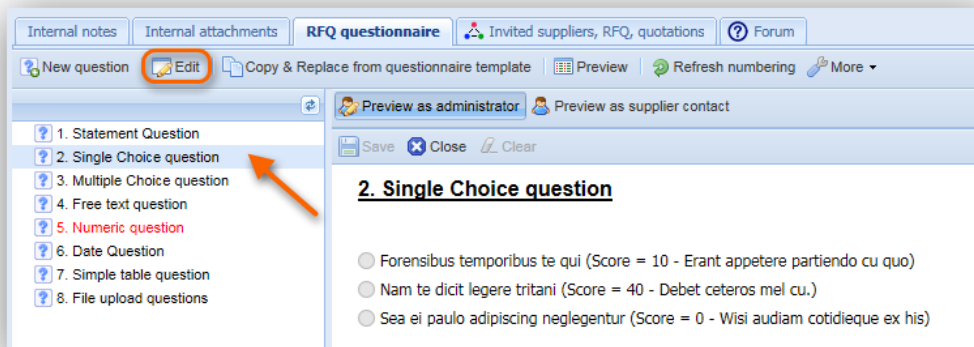
2.3.2.1.3.3 Moving a question

The application allows you to move questions via drag and drop to change the layer or to rearrange the order.

After you've completed the reorganisation please click the "Refresh numbering" button located in the action bar in order to adjusts the numbering of the questions.
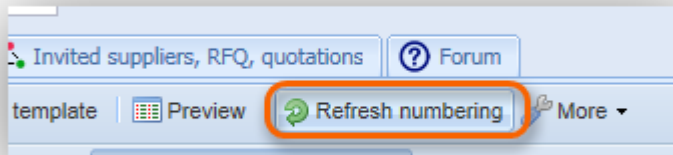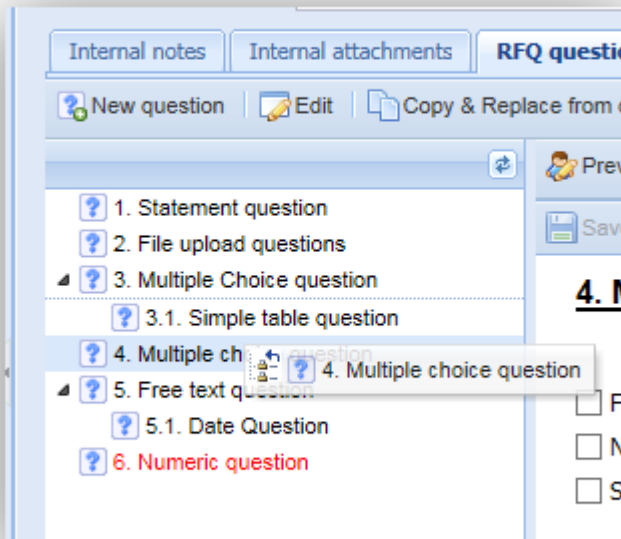
2.3.2.1.3.4   Update section

Changes made to questions will be shown in the "Updates" section of this tab. This feature will be very important especially if editing a question **after** the RFQ has been published as this update section will also be shown in the portal. Supplier contacts can easily track and trace which questions have been changed. In addition an automatic notification E-Mail will be sent to the attending supplier contacts in the case a question is changed after the RFQ has been

published and the RFQ is still valid (date of change would be between RRQ start and due date).
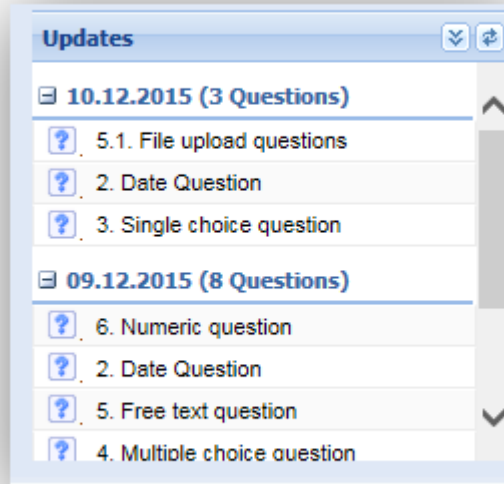
2.3.2.1.3.5   Internal explanation

The internal explanation section for a question can be used as an individual scoring guide for each question. This information are visible only in the internal application, the text is not visible in the portal.
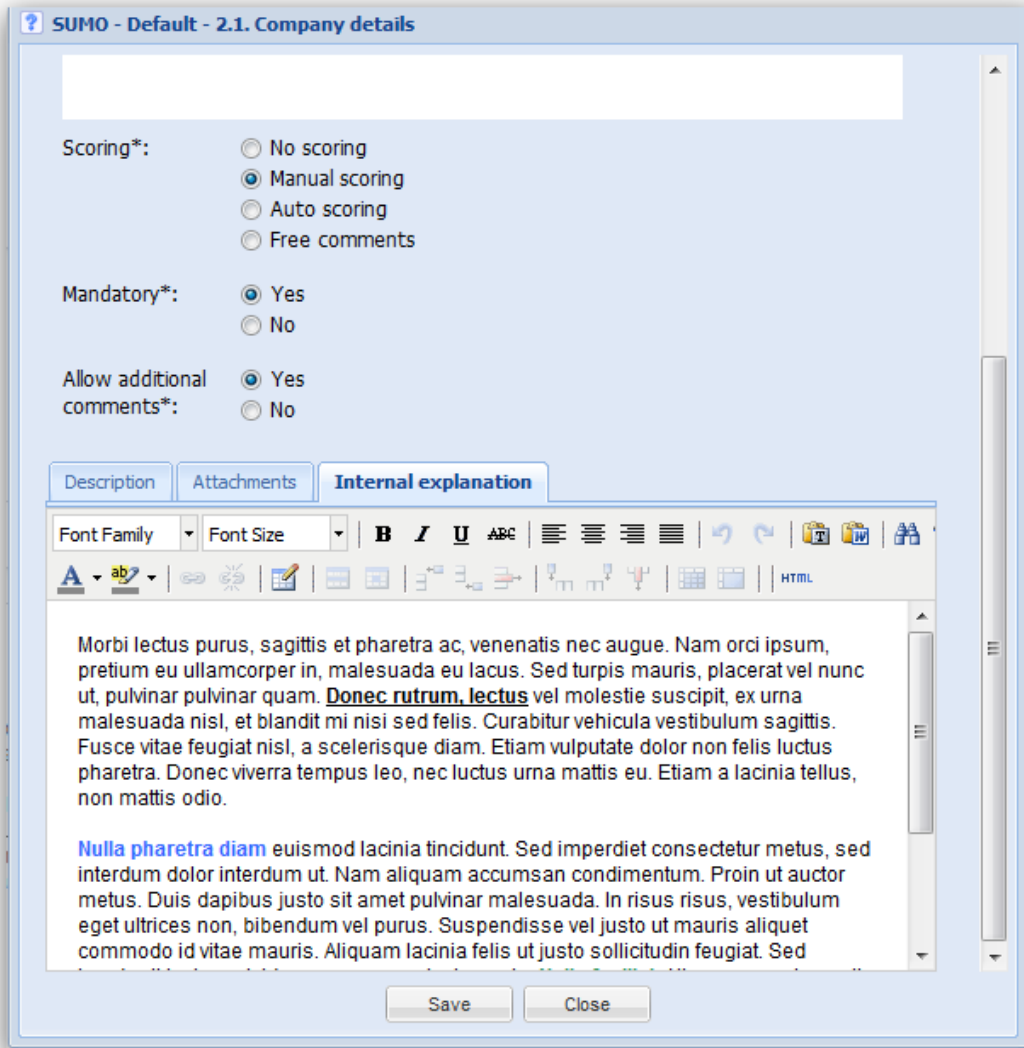
2.3.2.1.3.6 Actions offered in RFQ questionnaire tab

As well as the "New questions","Edit", "Refresh numbering" and "Copy & Replace from questionnaire template" buttons the application offers additional features.

Preview:

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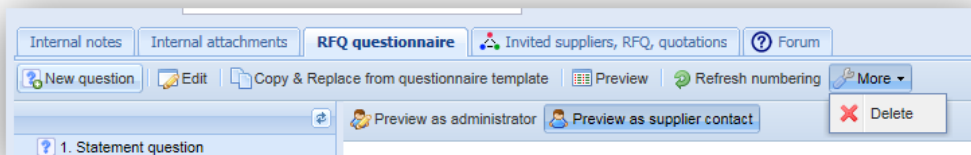
The "Preview" button allows you to open a new tab within your browser showing you all the created questions and answer options. The available content will be listed in a table as illustrated in below example.

Question	
1 Statement question	Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. No attached files are provided for this question.
2 File upload questions	Ad epicurei perpetua eos? Additional comments: Not allowed Mandatory: No Question type: File upload Scoring type: No scoring No attached files are provided for this question.
3 Multiple Choice question	Possible selection(s): Mel quas appareat concludaturque (Score: 20.0) Melius oporteat conclusionemque ei mel. (Score: 10.0) In his minimum delectus (Score: 15.0) Additional comments: Not allowed Mandatory: No Question type: Multiple choice Scoring type: No scoring No attached files are provided for this question.

More:

Listed under the "More" options the application allows you to delete selected questions.

2.3.2.1.4 Invited suppliers, RFQ, quotations

Within tab "Invited suppliers, RFQ, quotations" all supplier contacts invited to submit their answers to this RFQ will be listed and managed. Newly created RFQ you are able to invite supplier contacts to the RFQ you have just created, so that they will be able to see this RFQ in the portal and can eventually submit an answered Quotation.

To invite a new supplier contact to take part in a newly created RFQ, click the "Add supplier contacts" button highlighted in the screenshot below and select one or more supplier contacts in the appearing pop-up window. Please keep in mind that you can only invite one supplier contact per supplier for each new RFQ. However, you can add additional supplier contacts from the same company as additional readers to an RFQ.

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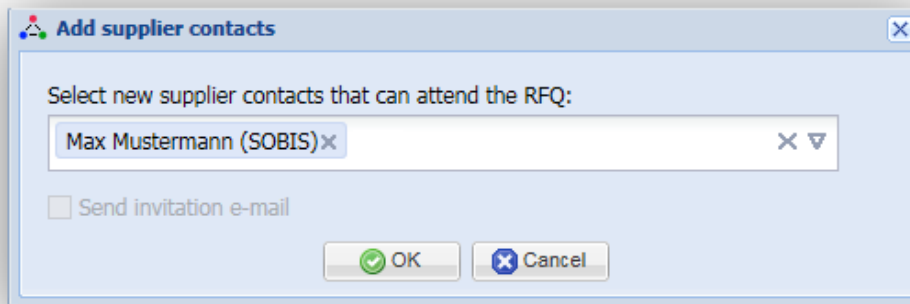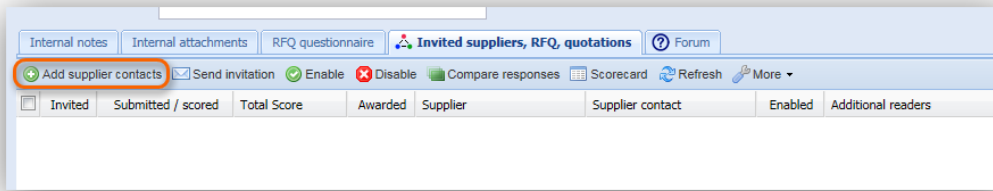
Once the selected supplier contact(s) have been added they will be listed with the status disabled which is illustrated by a red X in the "Enabled" column. To enable supplier contacts select the respective entries within the grid an click "Enable".

Please note: By adding a new supplier contact you automatically create an RFQ which can be opened in read mode by double-clicking the entry in the grid.
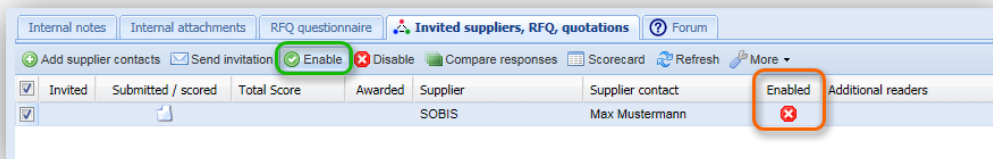
In order to send an invitation e-mail to the supplier contacts included in the RFQ it has to be published. As soon as you or the person responsible for the RFQ has published the RFQ invitation e-mails can be sent.
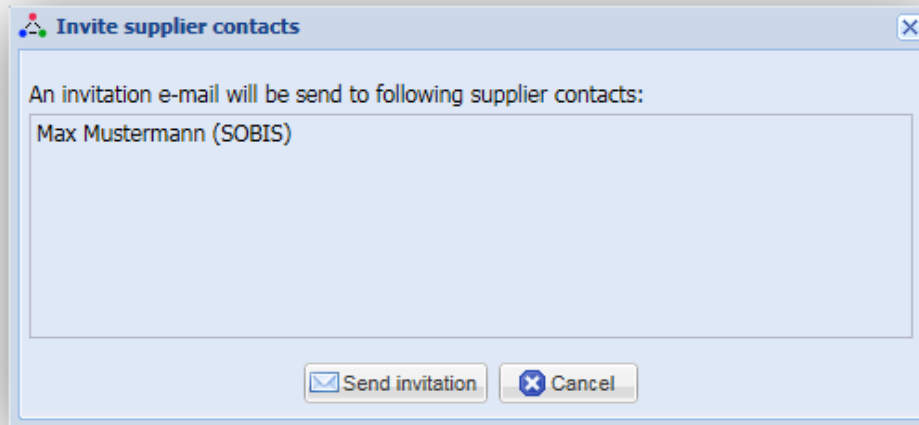
Please note: Invitation e-mails will also be sent to selected supplier contacts that are still disabled. The status will then automatically change to "Enabled".

Supplier contacts can also be added to an RFQ that has already been published and for which supplier contacts have already been invited. The process remains identical to the initial inclusion of supplier contact. However, additionally added supplier contacts can directly receive the invitation e-mail by selecting "Send invitation e-mail" when adding the new supplier contact(s).
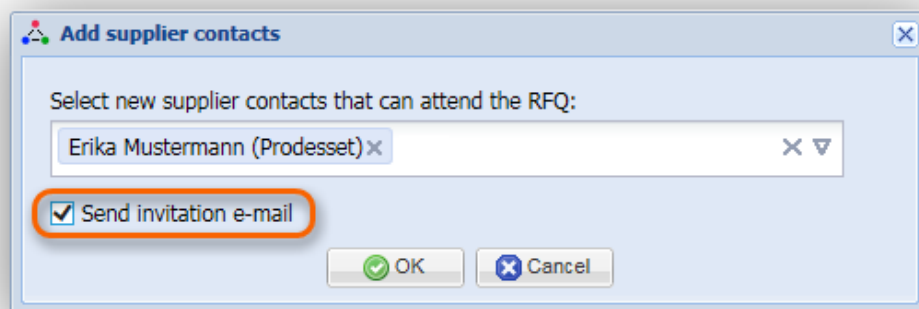
The new supplier contact will then automatically be set to enabled. Furthermore this sign appears in the "Invited" column indicating that an invitation mail has been sent.

Adding additional readers

As you can only invite one supplier contact per supplier to attend to an RFQ the application allows you to give limited access (read mode) to other supplier contacts from the same supplier. Mark a supplier contact within the grid, select the "More" button in the action bar and click "Add read access". Select additional supplier contact(s) in the pop-up window. To remove additional readers use the "Remove read access" button.

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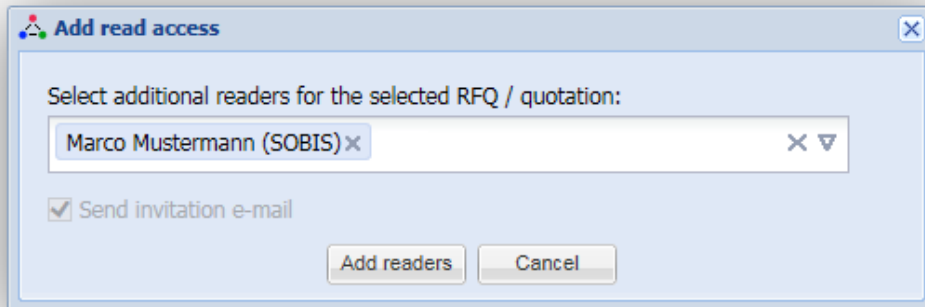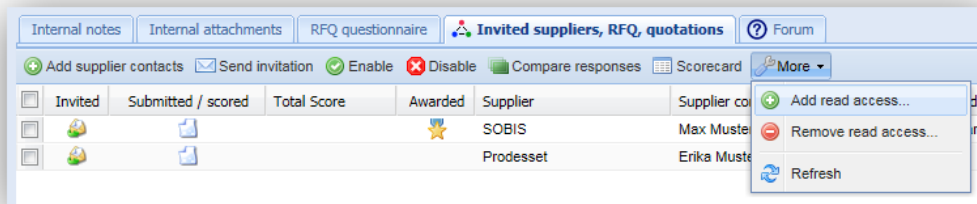
Confirm/Decline attendance to an RFQ - actions

A text will be visible on the top of the RFQ in the portal application, as long as the supplier contact confirm the attendance to the RFQ. The text will contain hyper links, when pressing on this links, the decision to attend or not will be saved to the RFQ document.

The decision to attend to an RFQ can be revised via a button.
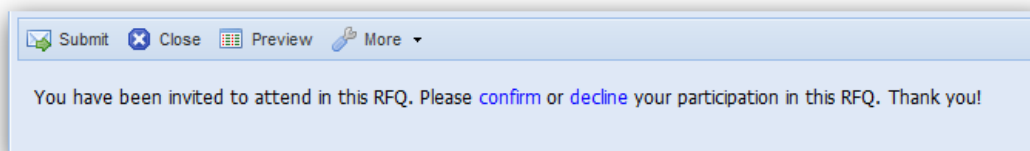
The text is visible as long as the supplier contact presses "confirm" or "decline". The decision can be revised after that via the button "More/Confirm or Decline attendance".

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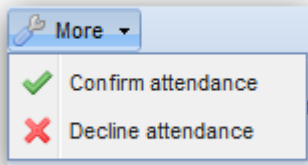
The confirm check (attend or not to an RFQ) are going to be saved and displayed in the grids (portal grid, internal application RFQ grid). Status of RFQ attendance is: yes, no, open (not answered).
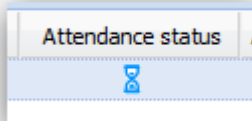
Additional actions offered within RFQ
As well as the "Add supplier contacts","Send invitation", "Enable", "Disable", and "Add read access" buttons the application provides you additional features within the tab's action bar.
Compare responses:
The "Compare responses" button allows you to open a new tab within your browser displaying all questions and answers of a scored/submitted/unsubmitted quotation. This is very useful to compare the answered questions of two or more supplier contacts. Based on your selection, all available content will be listed in a table as illustrated in below example.

Scorecard:
The score card enables you to compare the scores of scored/submitted/unsubmitted quotations listed according to the supplier.

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Question	Supplier (Max Mustermann, SOBIS) Status: Scored	Supplier (Erika Mustermann, Prodesset) Status: Submitted
1 Statement question		
2 Date Question	Et delenit repudiare debitis prodesset id eam.	
3 Single choice question	10	10
3.1 Single choice question\Simple table question	12	
4 Multiple choice question	50	
5 Free text question	100	
5.1 Free text question\File upload questions		
6 Numeric question		
Total score	**172**	

Refresh:
By clicking "Refresh" all grid content will be updated to include potential newly submitted quotations and changes.
More:
Listed under the "More" options the application allows you to delete selected entries.

2.3.2.2 Read RFQ information

To open an RFQ in read mode select the "RFQs" section in your navigation and double-click the respective entry within the RFQs grid.
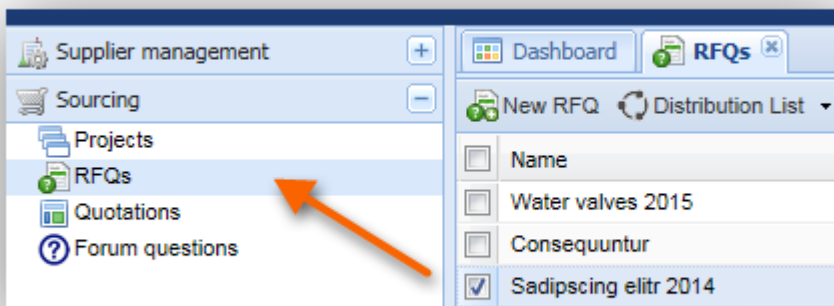
An RFQ in read mode consists of expandable sections containing all important information regarding the respective RFQ. By collapsing/expanding sections using the [x] and [x] symbol in the left upper corner of each section, you easily access the information you need.

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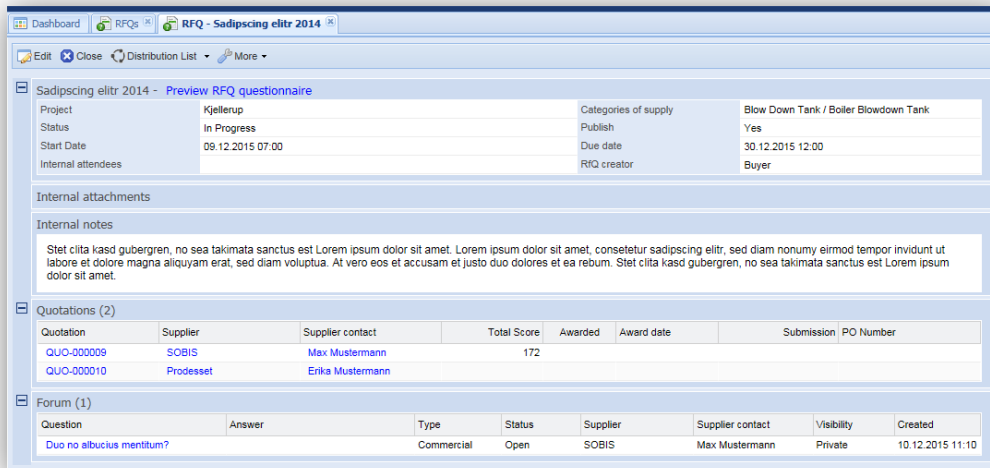
RFQ (General information)

Within the first section all general information about the selected RFQ is maintained. In addtion a embedded link will open a preview of RFQ questionnaire.

Internal Attachments

All files that have been attached to the RFQ will be listed in the second section. All attachments can be opened and downloaded directly in read mode. The attached files will not be transferred to the Portal.

Internal notes

Internal notes offer an option to add general internal remarks concerning the RFQ. They will also not be transferred to the Portal application.

Quotations

The "Quotations" section contains a list of all quotations submitted by invited supplier contacts.

Forum

In this section all forum questions submitted by invited supplier contacts, concerning this RFQ will be displayed.

Invited suppliers, RFQ,quotations

All invited suppliers to this RFQ will be displayed.

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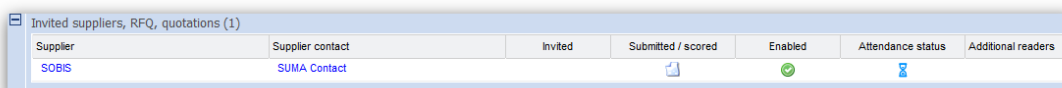
2.3.2.2.1 Offered actions for RFQ in read mode

Alongside the well-known "Edit" and "Close" buttons the application provides additional functions which are explained within this guide in detail.

Distribution List:

Please refer to chapter Distribution List

More:

- "Create PDF" allows you to create a PDF file from the selected document (please also refer to Create PDF)

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show access" enables you to verify which user have access to the selected document (please also refer to Show Access)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

- "Show notification e-mails" shows all corresponding e-mails which relate to the selected document (please also refer to Show notification e-mails)

2.3.2.3 Show Access

In order to check the access rights of certain internal users to a specific RFQ document, the application offers the "Show access" feature. It can be found within the "More" options of the actions bar.

The access to an RFQ document can either be verified within a grid or directly within an open document in read or edit mode. As illustrated by the screenshot, you need to first mark the document in question in your grid or open the document.

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Next select the "Show access" option in your action bar to display the access information. Please be aware that access settings can only be displayed one document at a time. If you select more than one entry within your grid and select this feature you will receive an error message.

The access information will be presented a pop-up window listing all users that have buyer or attendee access and includes the role these specific users have.
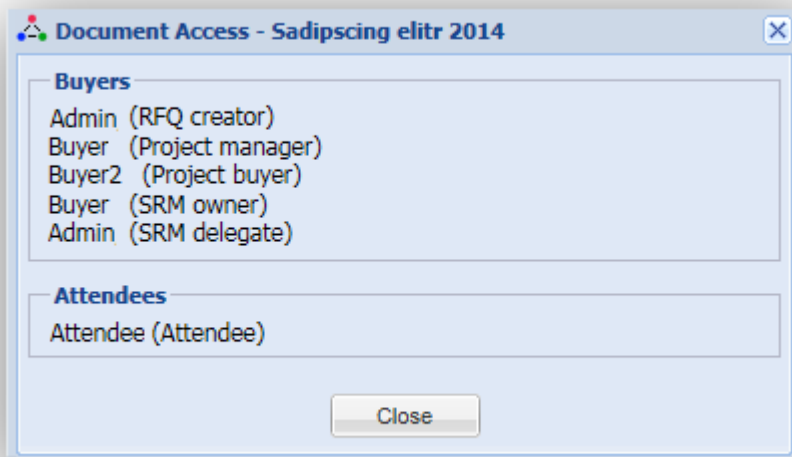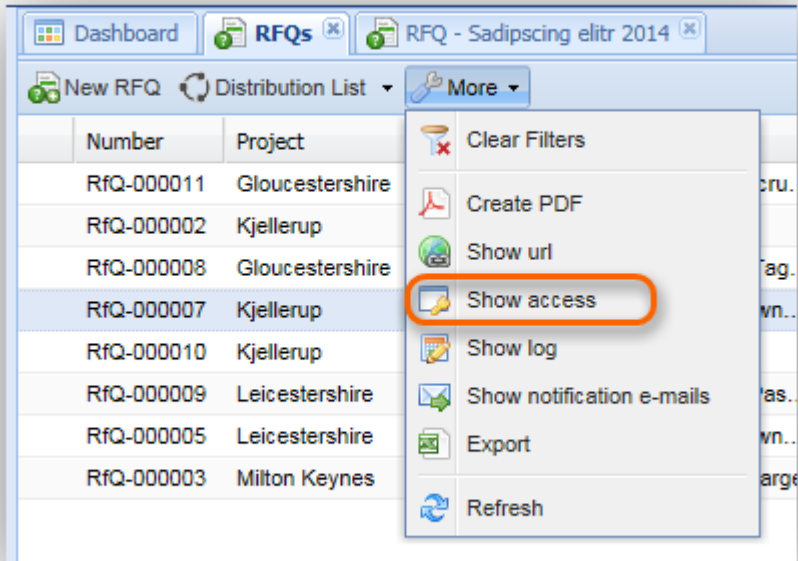
2.3.3 Quotations

Once quotations are submitted by supplier contacts they will be automatically transferred to your internal application. Questions where the option "Auto scoring" was selected will have been automatically scored based on the predefined values.

In order to score other answers given by the supplier contact that have to be evaluated manually open the respective quotation in edit mode and enter the tab "Quotation details". For more information regarding the different scoring types refer to chaper RFQ questionnaire.

2.3.3.1 Manage quotations

To administer your quotations you can either access a quotation via the RFQ questionnaire tab or select "Quotations" in the section "Sourcing" in the navigation pane.

When opening the "Quotations" section a grid with all your submitted and scored quotations will be displayed in the content area. To open and score a quotation double click the entry in question. The quotation will open in read mode. Select the "Edit" button in order to start the scoring process.
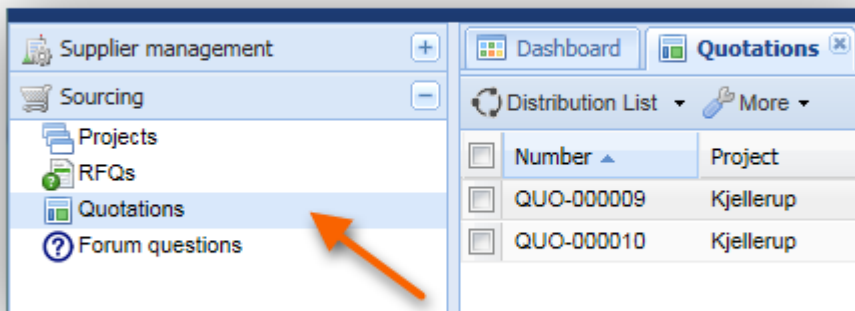
Please be aware that within the quotations you will only be able to edit the scores, however, the questions of the related RFQ can be edited within the actual questionnaire document. To learn more about editing questions please refer to chapter Create and update an RFQ.

2.3.3.1.1 Quotation Tabs

The header of each quotation displays the most important information required for a good overview (e.g. title of the related RFQ or the total score received based on the suppliers answers).

In addition, a quotation document offers three further tabs within in content area: Quotation details, Award information and Attachments.

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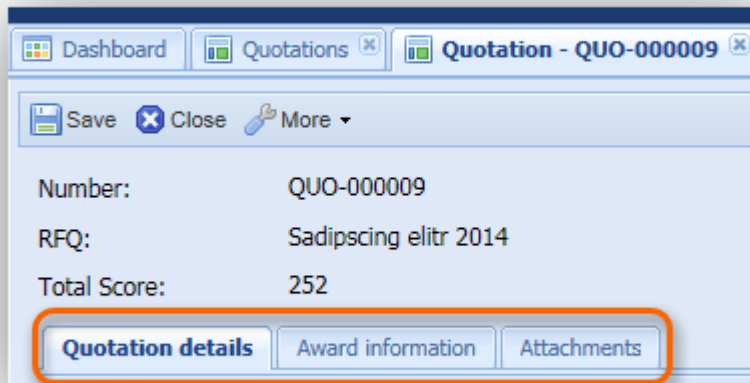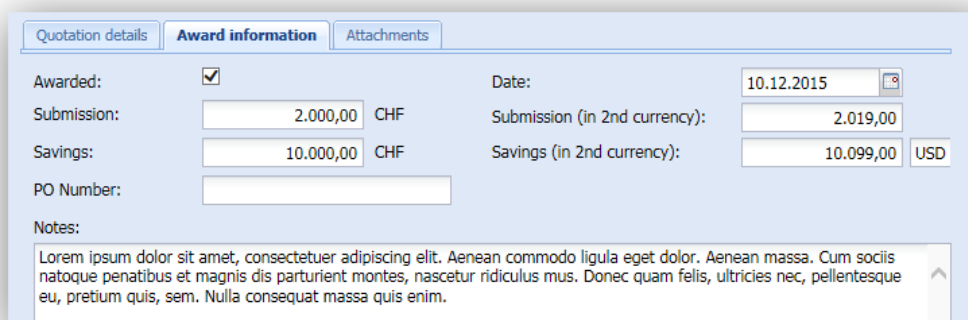
Quotation details

Within the quotation details tab all questions of the RFQ together with the answers given by the supplier contact are listed and can be scored. Please refer to chapter Score quotation for additional information.

Award information

Within this tab you are able to award a quotation and define the related information as shown in the screenshot. In other words confirming that a supplier has been awarded with the procurement contract based on the information submitted in the quotation and the details inserted within the award information.

Internal Attachments

Where additional information in the form of files needs to be included within a quotation you are able to upload these attachments within this tab. All attached files can be renamed ( ), viewed ( ) or opened and directly downloaded ( ). The attachment will not be visible to the supplier within the Portal.

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2.3.3.1.1.1 Offered actions in edit mode

Alongside the well-known "Save" and "Close" buttons the application provides additional functions which are explained in detail within this guide.
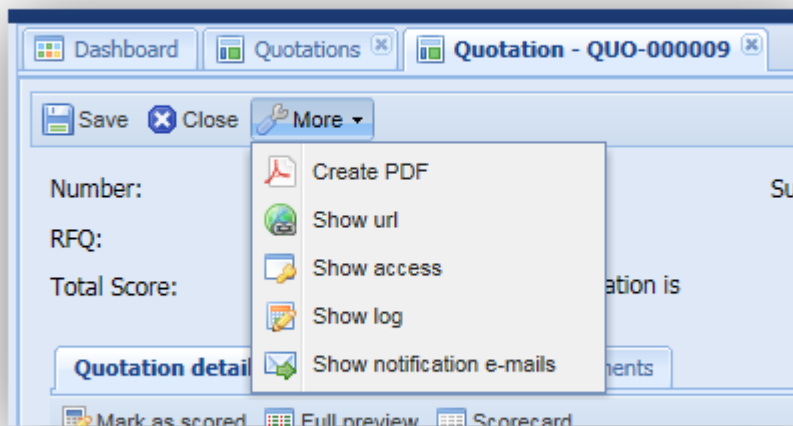
More:

- "Create PDF" allows you to create a PDF file from the selected document (please also refer to Create PDF)

- "Show url" will present you with the url that directly leads to the selected document (please also refer to Show URL)

- "Show access" enables you to verify which user have access to the selected document (please also refer to Show Access)

- "Show log" displays the log history of the selected document (please also refer to Show Log)

• "Show notification e-mails" shows all corresponding e-mails which relate to the selected document (please also refer to Show notification e-mails)

2.3.3.2 Score quotation

The first tab within the quotation document offers a detailed list of all RFQ questions, the answers given by the supplier contact as well as any updates the supplier might have submitted to one or multiple questions since the first submittal.

On the left hand side of the tab, a navigation pane allows you to open either answers to a specific question or the details of an update. Detailed content will be displayed on the right side of the tab.
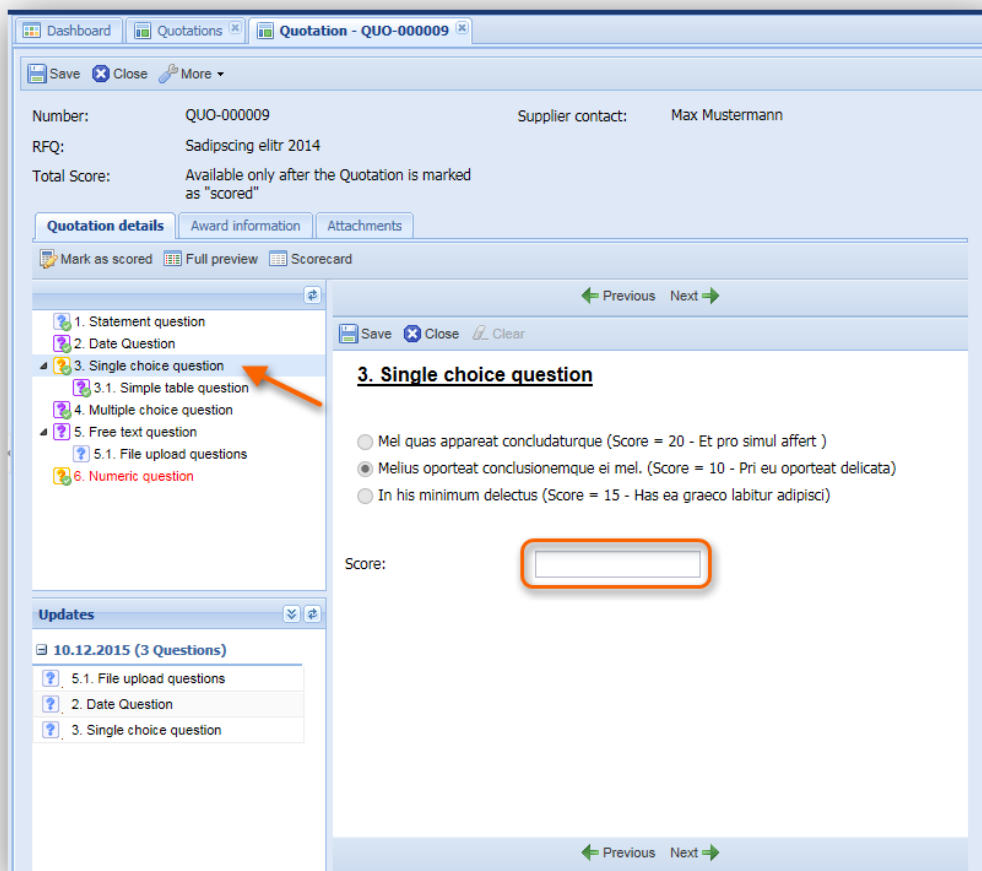
To review and score an answer select the question in the navigation and enter your score in the respective value field as illustrated in the following screenshot. The color scheme of the questions within the navigation pane indicates whether a question has been answered and if the answer can be scored. To learn more about the color scheme refer to chapter RFI - Request for information.

Internal explanation about how to score a question or other explanation about each question are available in the new field "Internal explanation", visible for each question.

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Please note: Depending on the scoring type of the question which was defined by the RFQ creator, you might not be able to enter a manual score. The scoring field of a question from type "Auto scoring" for example will not be adjustable, therefore it will be greyed out.

Marking a quotation as scored

Once you've scored all the questions, please click the "Mark as scored" button in the action bar. Only if a quotation is marked as scored will the application be able to calculate the total score.
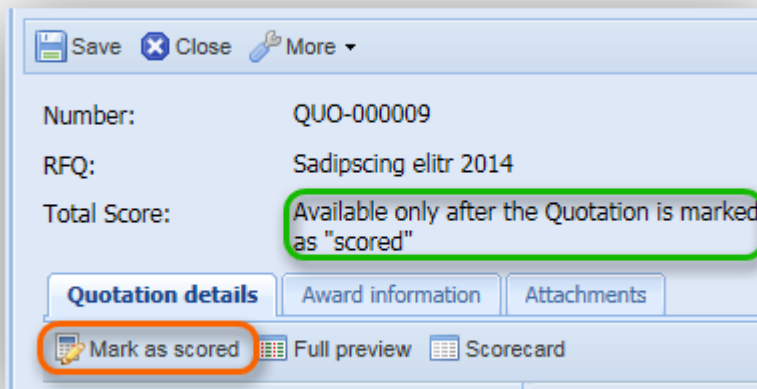
After the scoring process is completed and marked as such, save and reopen the quotation in order to review the calculated total score.

2.3.3.2.1   Offered actions within "Quotation details"

Beside the "Mark as scored" feature, the application provides two additional functions: Full preview and Scorecard.
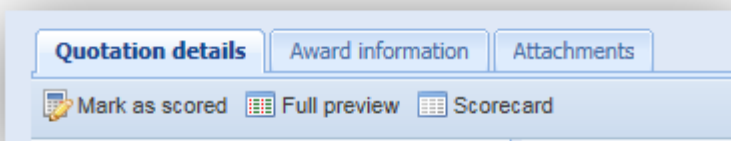
Full preview:

The "Full preview" action will display all RFQ questions and the answers given by the supplier as well as their respective scores in a new browser tab.

Question	Supplier (Max Mustermann, SOBIS)	Score
1 Statement question Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi.		
2 Date Question	18.12.2015	Et delenit repudiare debitis prodesset id eam.
3 Single choice question	• Melius oporteat conclusionemque ei mel.	90
3.1 Single choice question\Simple table question	Te sit minim libris invidunt Ad epicurei perpetua?: Duo no albucius mentitum. Reque periculis?: Vix vidit timeam partiendo. Cum id modo prodesset?: Id vix tale adipiscing.	12

Scorecard:

Selecting the "Scorecard" action will also open and display all RFQ questions in a new tab, however only the title of each question and the received scores of each question will be included. This option offers a summarised overview of the scored results.

Question	Supplier (Max Mustermann, SOBIS) Status: Scored
1 Statement Question	
2 Single Choice Example	
2.1 Single Choice Example\Scoring: manual score	10
2.2 Single Choice Example\Scoring: manual score and score in options	9
2.3 Single Choice Example\Scoring: auto score	85
2.4 Single Choice Example\Scoring: free comments scoring	
2.5 Single Choice Example\Scoring: free comments and option scoring	Donec sodales sagittis magna. Sed consequat, leo eget bibendum sodales, augue velit cursus nunc.
3 Multiple Choice Example	
3.1 Multiple Choice Example\Multiple Choice: Allow additional comments	
4 Free Text Question	
5 Numeric Question	
6 Date Question	
7 Simple Table Question	
8 File Upload Question	
Total score	**104**

2.3.4 Forum questions

The "Forum questions" section is a list of all questions raised by supplier contacts regarding RFQ's. All questions can be listed according the RFQ they refer to or the supplier contact who

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added the entry using filter. To open a forum question double-click the respective entry within the grid. You can also access forum question directly from within the related RFQ in read or edit mode. Unlike in the other document types, forum question will always open directly in edit mode.
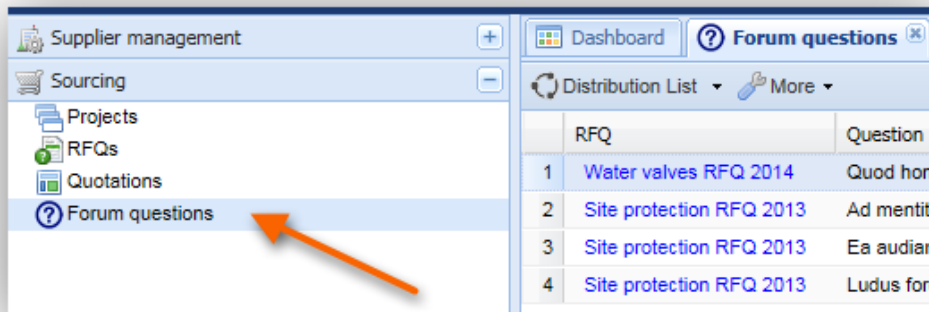
2.3.4.1 Manage and edit forum entries

After double-clicking a forum question the entry will open in a new tab. You can now review the question in detail and enter your response.

Type

When raising a question in the Portal the supplier contact is asked to choose whether his question has a commercial or technical basis. As an Admin, Manager or Buyer however, you will be able to change the defined type in case the value might be incorrect.

Status

After you have entered your response within the "Answer" text box and clicked "Save" a message box appears asking whether to directly change the status to answered.
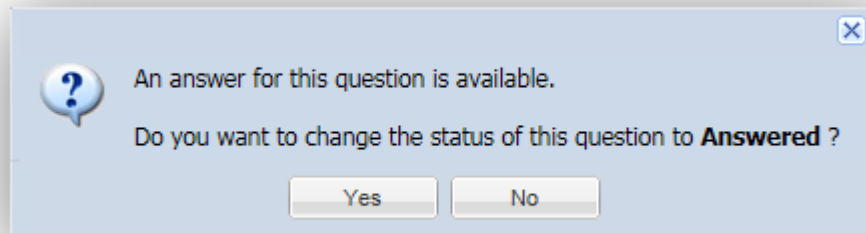
You are able to define the status using the radio buttons below the answer field (see area in screenshot outlined green).

Visibility

You can decide whether this question should be visible for all supplier contacts attending this RFQ (public) or only the questioner and related additional readers from the same company should be able to review this entry (private).

If a forum entry is set to public all information including the supplier contact asking the question will be visible to all Portal user with access to the RFQ.

Distribution of notification for forum questions

If a commercial question is created in the portal, the notification will be received by the SRM owners and SRM delegates from the categories of supply of the RFQ.

The technical questions notification will be recieved by the SRM owners and SRM delegates from the categories of supply of the RFQ and the internal attendees listed in the RFQ.

2.4   c. Reporting

All stored information within the application can be used to create reports, therefore presenting the information in a different format, with a new perspective and maybe from a different angle.

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Access the reports grid by selecting "Reports" listed in the "Reporting" section of your navigation pane located on the left hand side of the application.
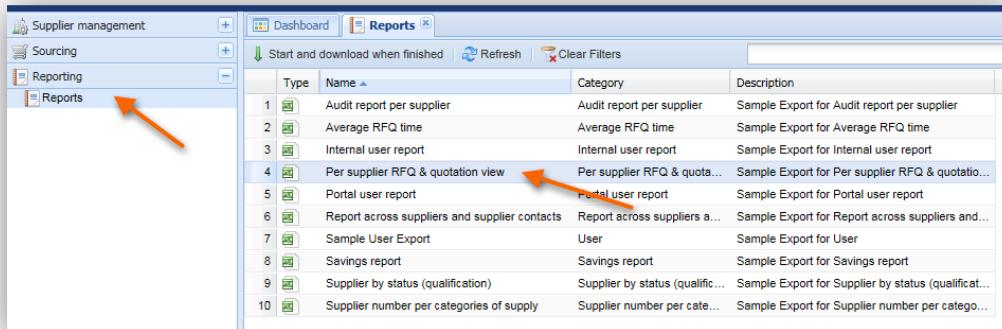
There are certain standard reports that the application provides to each user such as the export of all suppliers belonging to certain Categories of supply.

In addition, it is of course also possible to have individual reports created for you by your SOBIS support team. Reports can be created in different formats based on the individual requirements. Supported formats are PDF, Excel, MS Word, HTML.

How to run a report

The quickest way to initiate the report you are interested in is to double-click the respective entry in the content grid. The application will then create the selected report based on the application's information for which you hold the necessary rights.

Besides the option to use double-clicking, a report can also be started by first selecting the required entry, and then using the offered start report option (Please see screenshot below).
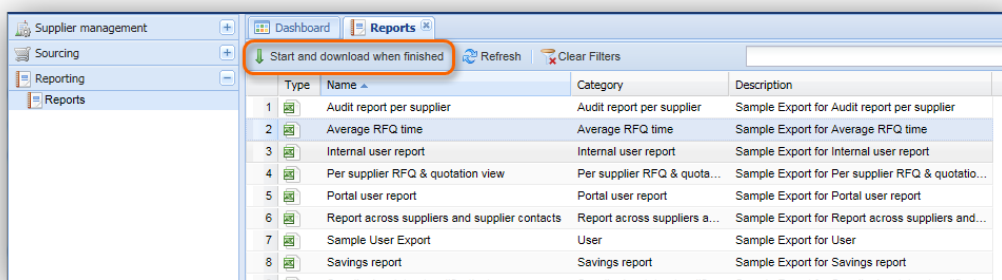
After initiating a report, a pop-up window will appear tracing the status of the download. You can close this window and reopen it by clicking the light blue arrow symbol that appears in the upper right corner of your application screen. The completion of the report download will be indicated by this arrow as well. The file download is completed and can be opened as soon as the arrow turns green .

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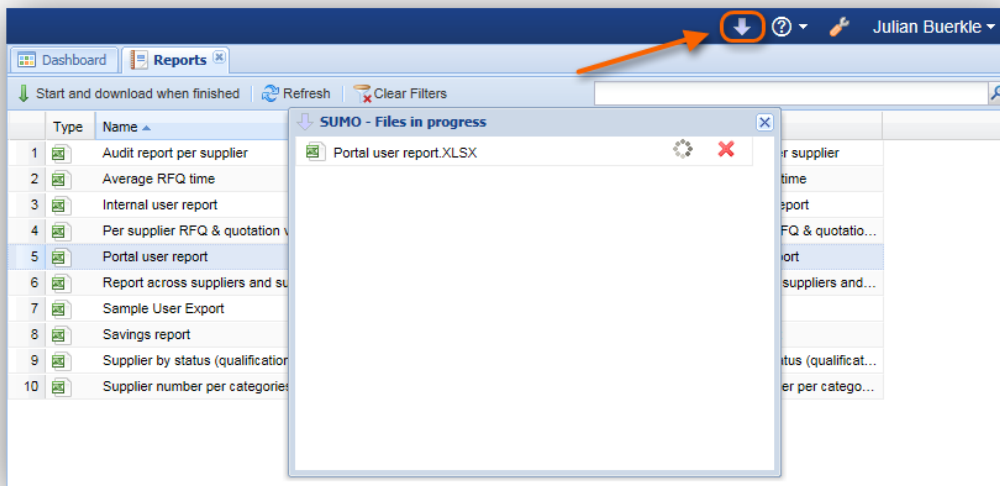
Additional report configurations

In order to allow the user to specify or restrict the data that is used for the creation of a report, the application offers additional report configurations before starting a report. Depending on the report you would like to run you are able to enter further information e.g. a specific supplier or only a certain type of category of supply to be considered for generating a report. This additional report query needs to be included in the report setting in the application's administration area. For further information please contact your SOBIS support.
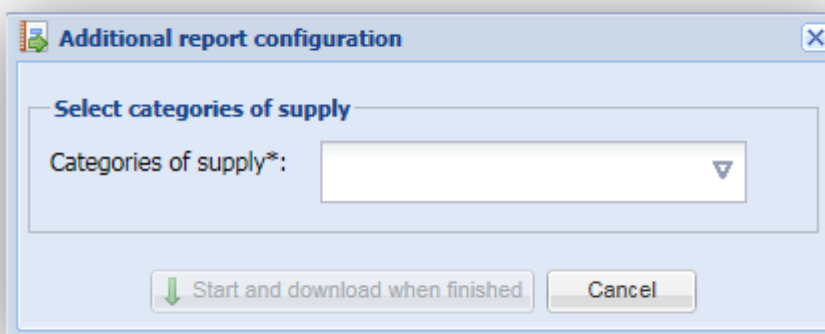
2.5 d. General

This section gives you an overview of general repetitive functions within the application which can be accessed from every document and grid, such as the application log and the creation of pdf-files.

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2.5.1   E-mails sent from the internal application

There are several document types in your internal application from which you can send notification e-mails. In some cases notifications are also sent automatically.

Notification e-mails will inform the recipient, usually the supplier contact, about the successful registration within the Portal application, a task that has been assigned needing action, a new RFQ to be completed or an update within an active RFQ.

Below all standard notification e-mails are listed according to the document type to which they refer.

2.5.1.1   1. Supplier contact

There are several manual as well as automatic notification e-mails used to inform supplier contacts about their status and their access.

2.5.1.1.1   Confirmation of registration

When a supplier contact has used the self registration process to create a supplier contact within the Portal they will receive a "Thank you for your registration" e-mail. This notification is sent automatically after the contact has completed the registration process and means that they have entered all required information and successfully saved the contact document.
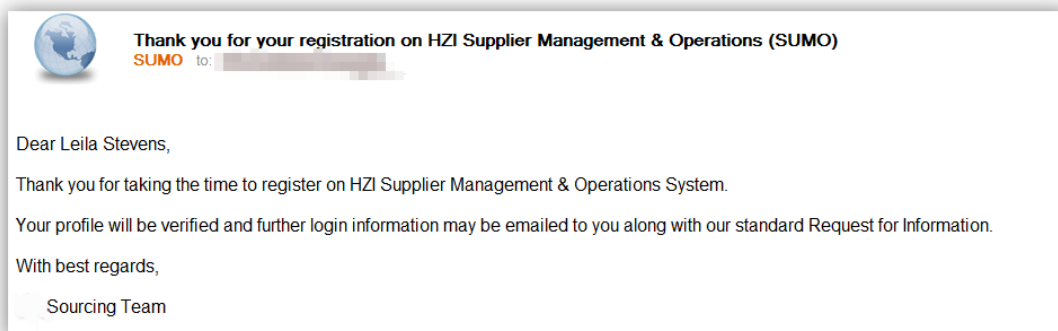
2.5.1.1.2   Send login information

Once a supplier has self registered their contact needs to be enabled within the internal application. To enable a supplier contact, open the contact document and use the button "Enable & send user credentials".

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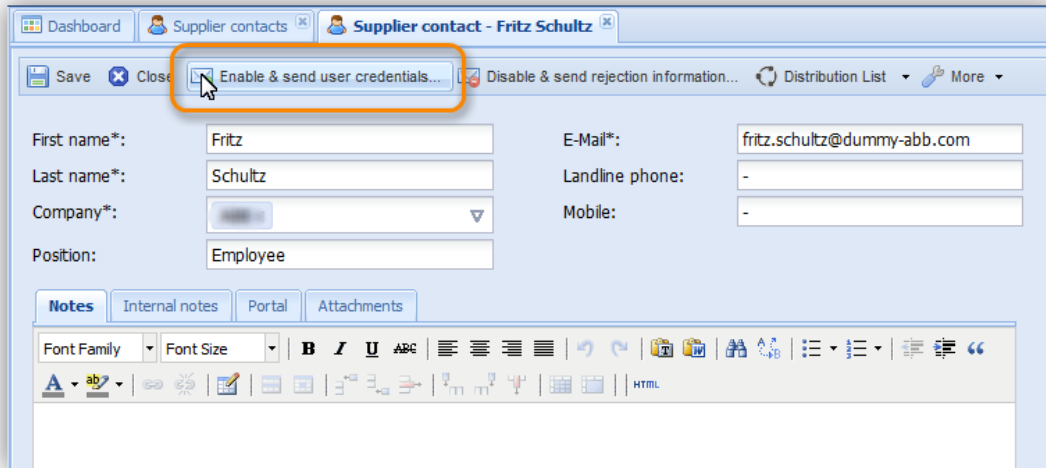
After clicking this action, the supplier contact will be able to take part in RFQs and can edit their information as well as the company information. They will be notified about access and receive login credentials in an automatic notification e-mail.
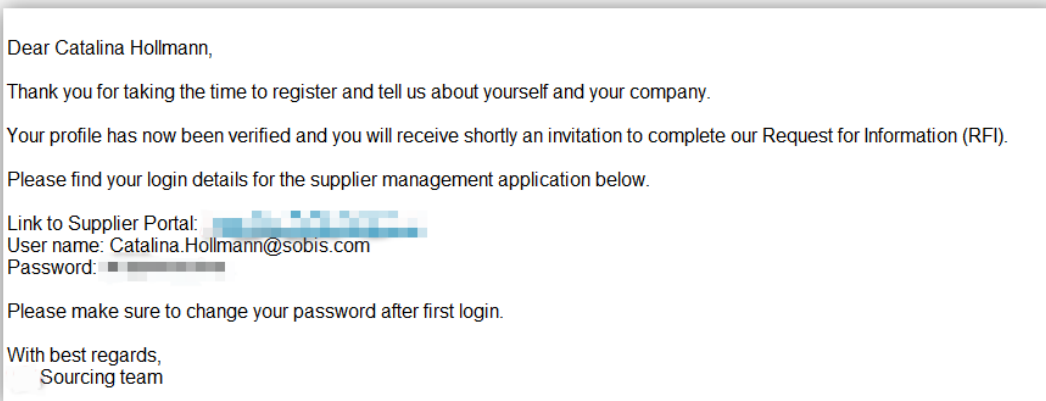
2.5.1.1.3   Reject registration of supplier contact

Similar to the process of enabling a contact you are also able to disable a supplier contact meaning for example that the contact will not be able to take part in RFQs. By using the button "Disable and send rejection information" within the supplier contact document you deactivate the access rights of the supplier contact and he will be automatically informed about the rejection with a standard notification e-mail.
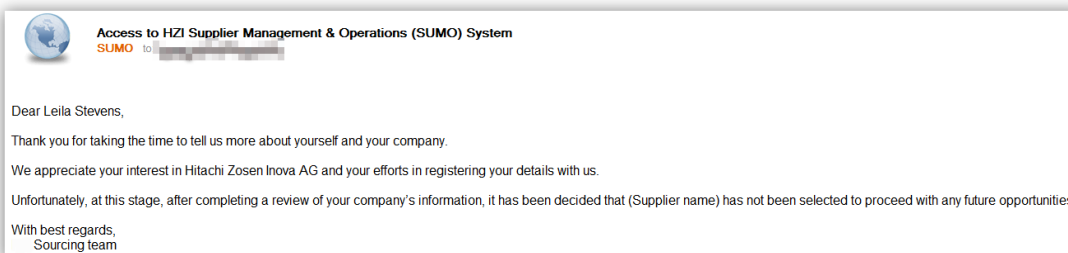
2.5.1.1.4   Reset password

Once a supplier contact has been enabled and received login credentials there will be other functions available within the supplier contact document in your internal application called "Resend user credentials...". This feature can be used where a supplier contact has lost or forgotten their password.
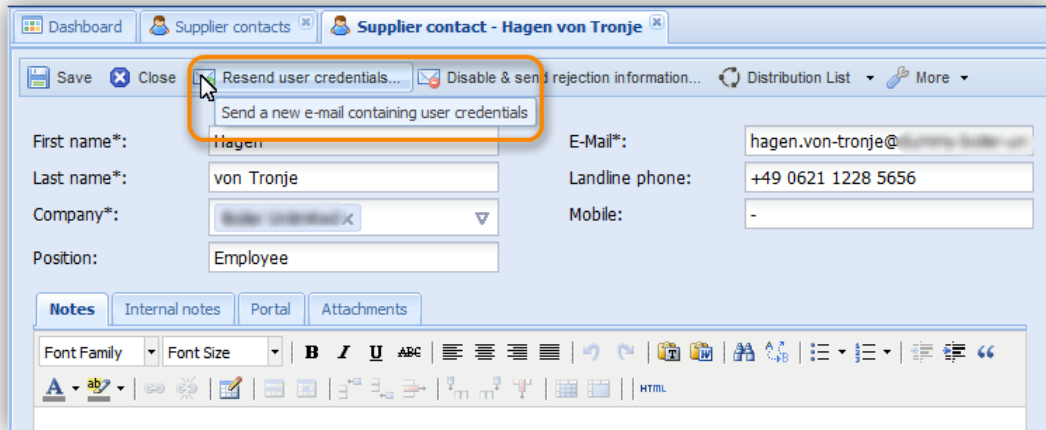
This action allows you to reset the contact's login information and resend the new credentials using a standard notification e-mail that will be created and sent automatically after clicking this button.

2.5.1.2 2. RFQ & RFI

2.5.1.2.1   RFQ - invitation to an RFQ

Once a new RFQ has been created, you are able to add various suppliers by inviting supplier contacts. To invite supplier contacts, first add the required contacts to your RFQ and use the "Invite supplier" button (see screenshot below).

Invitation to RFQ
SUMO to: Jane Stone

Dear Jane Stone,

You have been selected to respond to RFQ for Leicestershire. You are invited to review the project information and submit your response online.

The submission period is between: 01.01.2015 12:00 - 31.05.2016 12:30.

Please click on the secure link below using your username and password to learn more about this opportunity and to submit your response.

URL: https://suma-test.sobis.com/portal/

Should you have any questions please post them directly via the **Forum** section of the RFQ.

With best regards,
HZI Sourcing team

If you have forgotten your password, you can reset it.

2.5.1.2.2   RFQ - add additional reader to an RFQ

Where additional supplier contacts from the same supplier require access to an RFQ, you are able to add and then inform additional readers. To assign or remove additional access, first select the supplier contact in question within the RFQ tab "Invited suppliers, RFQ, quotations", then open the "More" options and use the "Add/remove read access" button.
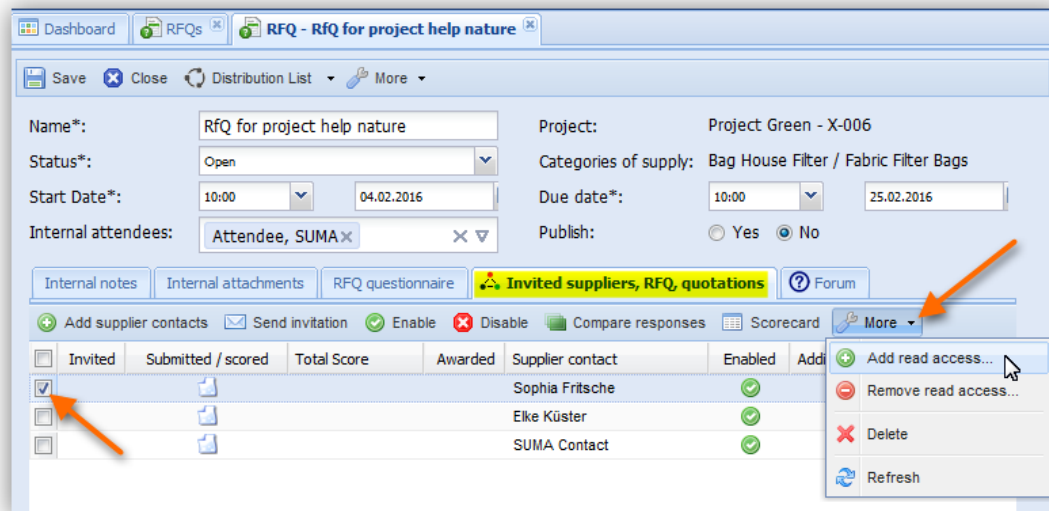
 The additional invitation e-mail will be sent automatically to all added supplier contacts with read access.
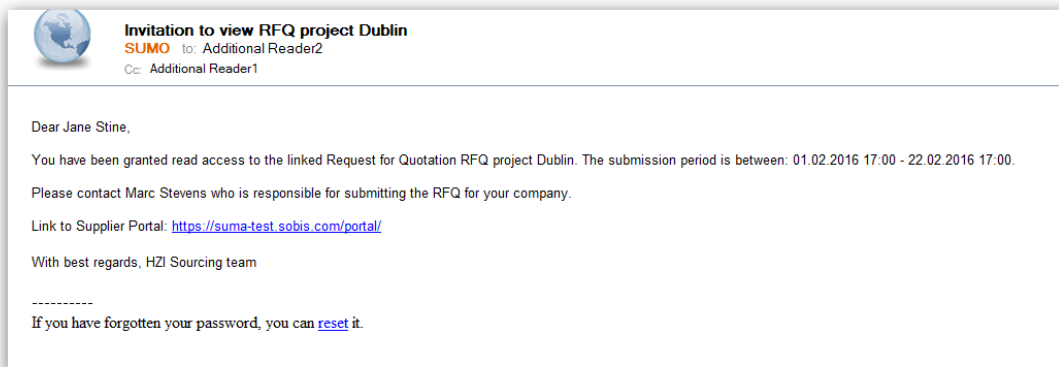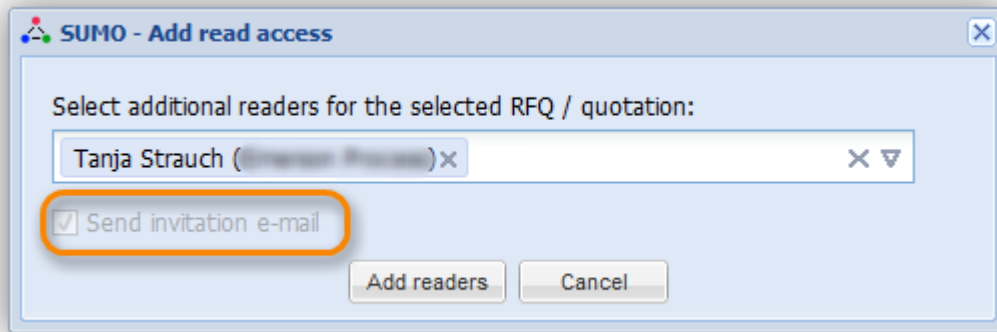
2.5.1.2.3   RFQ forum question

If a forum question is answered, a notification e-mail will be sent out to the supplier contact who created the forum question automatically. The e-mail will be generated and sent without any warning or request for confirmation.

2.5.1.2.4   RFQ/RFI questionnaire

If an **active** and **published** RFQ or RFI is modified all supplier contacts invited to the RFQ or responsible for the RFI will be informed about the update with a notification e-mail.

However, there are several conditions before the e-mail notification will be sent:

- The RFQ/RFI needs to be valid (has not reached the end date)

- A Question in RFQ/RFI has been **modified**. Following changes are considered**:** Modification of the **Start Date** and the **Due Date**

    o name of question

    o description (text of question)

    o possible answers (SINGLE and MULTIPLE choice)

    o mandatory field

    o additional comments

    o attachments (files files)

- question type

- renumbering of questions

- **Quotation** for the Supplier Contact is **enabled** (supplier contact can access RFQ)

- Status of **Supplier Contact** is **enabled** (supplier contact has access to Portal)

- Notification about the change has **not been send yet** (mail should not be sent multiple times)

The notification e-mail itself is created automatically based on a scheduled process. The frequency on which these type of notification mails are sent out is managed within the global administration.

2.5.1.3 3. SRM action

When a new SRM action is created and assign to a supplier contact, they will automatically be informed with a standard notification e-mail.

Where you would like to inform or remind a supplier contact about an open SRM action you can use the button "Send information e-mail".
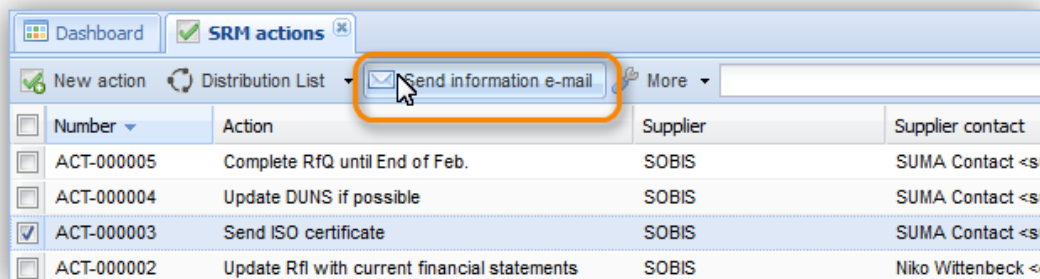
A standard notification e-mail including the link to the open SRM action will be sent to the supplier contact.

2.5.2   Distribution List

Within all action bars of application grids that contain any type of document as well as within the action bar of every document you will find the action "Distribution List". This option allows you to communicate and closely collaborate with your internal team members by sending links to documents stored in your internal application accompanied by a personal comment or note.

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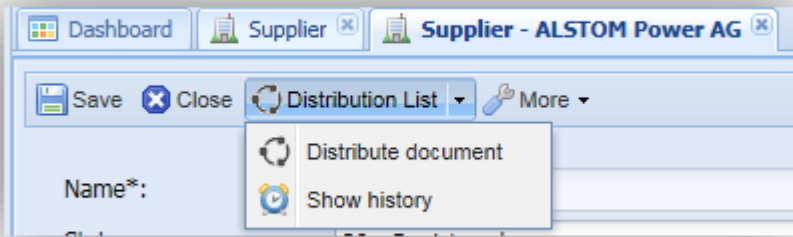
By directly clicking the distribution list button the distribution document will be created instantly. If you expand the action by clicking the arrow, it offers two selection possibilities. As illustrated by the screenshot, you can either choose to distribute the selected document or show its distribution list history.

The "Distribution document"

In order to share information with your team members first select the document in question within an application grid or open the document. Next select the "Distribution List" option in your action bar and enter the recipients within the new window that has just opened up. Optional, you can also select the recipients from the address book using the arrow head located to the right of the recipient box (please see screenshot below).
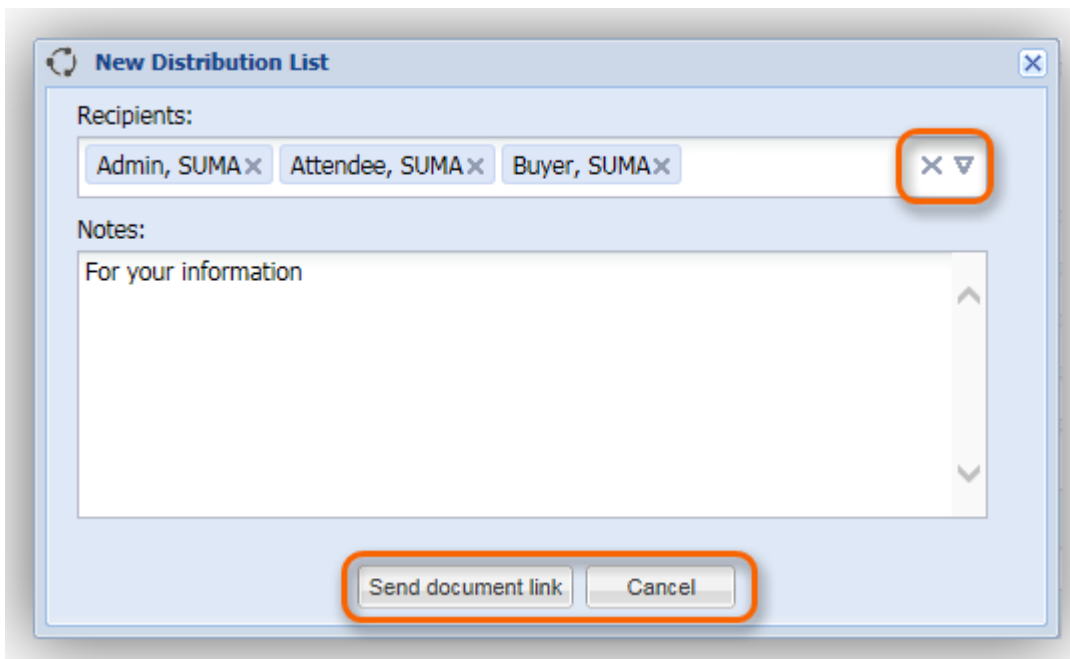
The second field within the pop-up window is a text box allowing you to write a personal note that will be shared with all recipients who receive this distribution list. As demonstrated by the

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image, you will then be able to send the link to your selected document together with your note to your chosen team members.

The recipients will receive an e-mail that includes note together with a link that will lead them directly to the respective document within the application. Furthermore the email will contain a standardised text and signature including the name of the sender.

Please be aware that only recipients that have access to your internal application will be able to open the enclosed link, therefore accessing the full document. Also, only one document can be included in your distribution list. Should you select more than one document an error message will remind you about this fact.

The "Show history" function

In order to ascertain whether a document has been distributed and whom you can use the second option of the distribution list action.
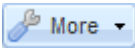
First select the document you are interested in, next open the "Distribution List" option and click "Show history".
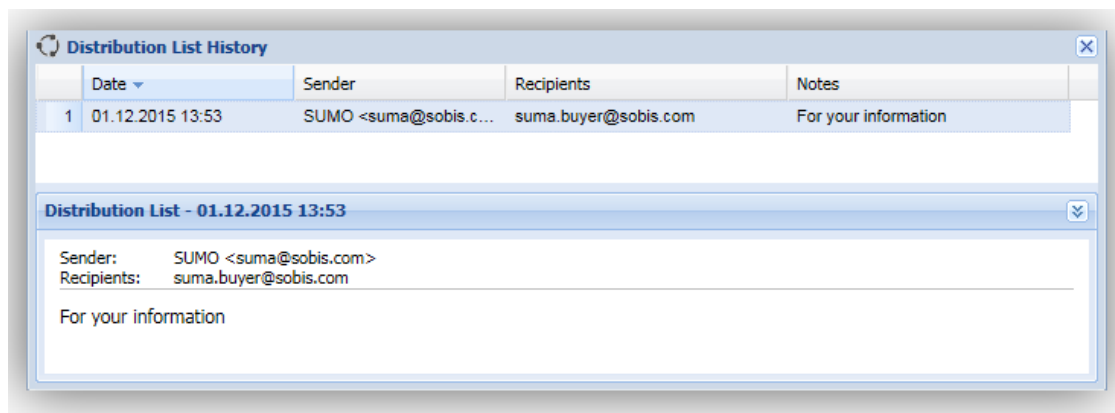
Consequently, either a new window will open displaying the file's distribution history including the distribution dates, senders, and recipients as well as the respective notes (Please see the screenshot) or a small message box will inform you that the document has not been distributed yet.

2.5.3   Show URL

Each document file is assigned a unique document URL as soon as the file is saved.

In order to trace the unique URL of a document you can either select the file within the respective grid (e.g. "Supplier") or open the document in read or edit mode. Next expand the the options positioned in your action bar, and select the option "Show url".
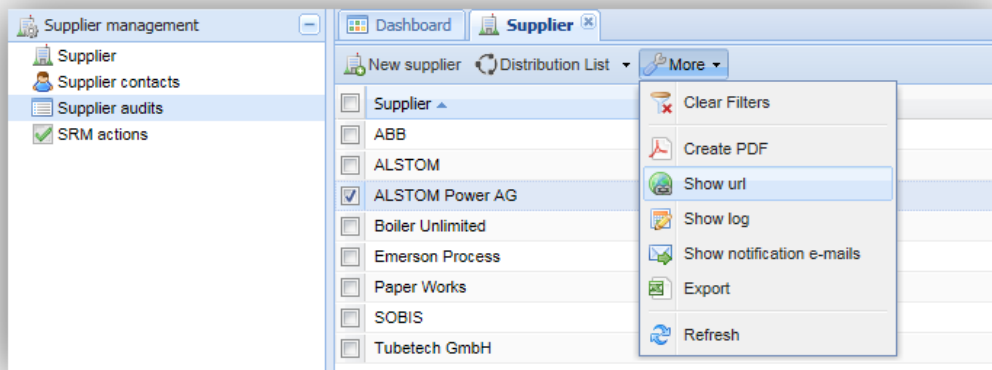
A small message box will appear in the center of your screen containing the document URL and giving you instructions on how to copy the link the quickest way possible.
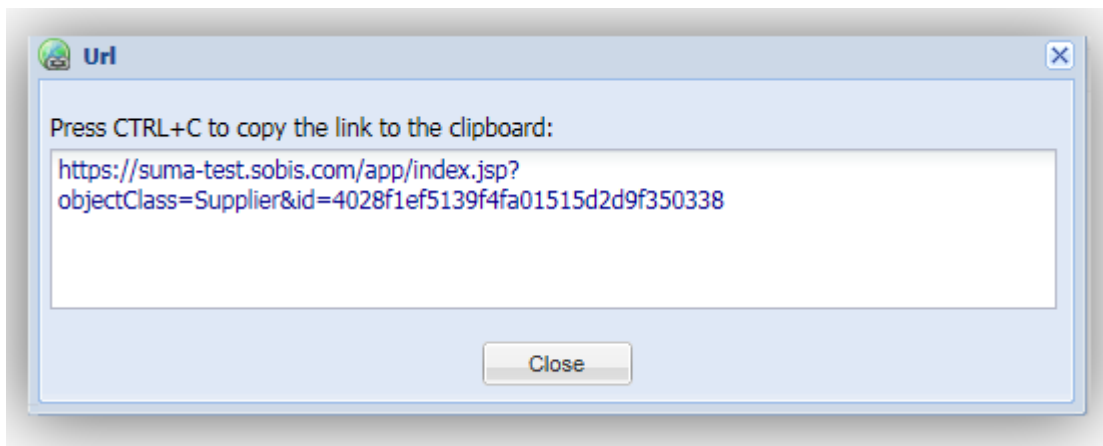
2.5.4 Show Log

The document log is a very helpful tool to analyse and trace changes, modifications and actions concerning a specific document. It enables users, especially application managers and administrators to insure that each step during the editing processes of all types of documents can be tracked and trace back to the person who modified the document in question and when each modification took place.

This function therefore, insures that no information is lost and that it can be restored if necessary.
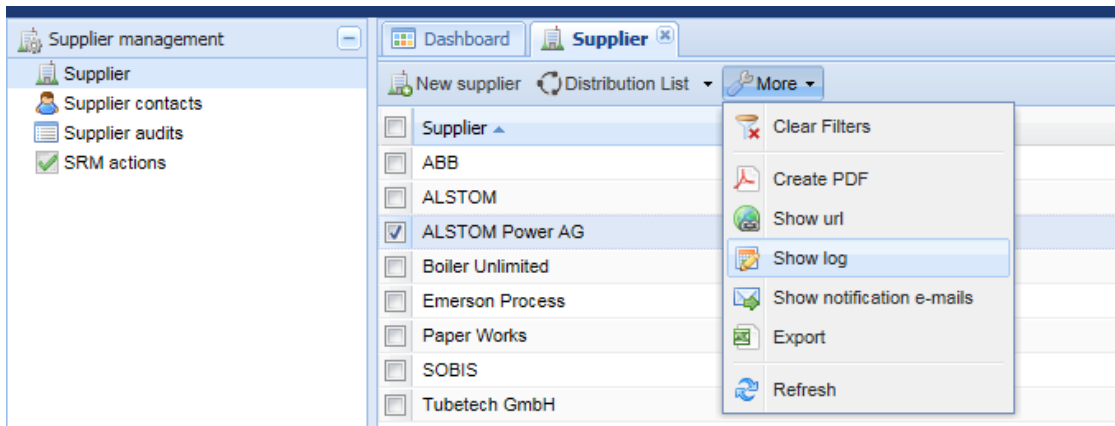
Three fields are displayed within a document log window. The top field will always show the creation date of the document as well as its creator and the date the document was last modified as well as by whom.

The second field presents you with a table listing all document modifications and actions. It includes the date a modification was made, the specific field that was modified as well as the responsible application user.

Within the third field the actual modification of the selected table entry will be displayed showing you not only the modified field name, the modifier and the date of the modification but also the original as well as new value of the field in question.
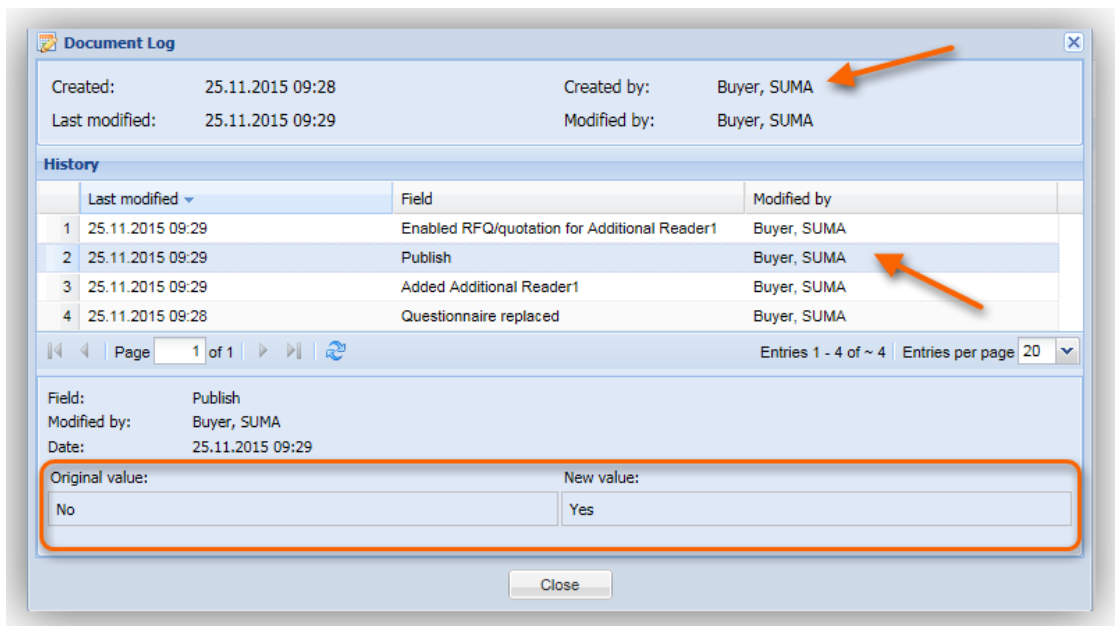
2.5.5   Show notification e-mails

The "Show notification e-mails" option in the action bar, offers a quick and easy way to see all corresponding e-mails which relate to a certain document. For an RFQ it shows for instance who has been invited to attend to a quotation and if a supplier contact submitted his quotation.

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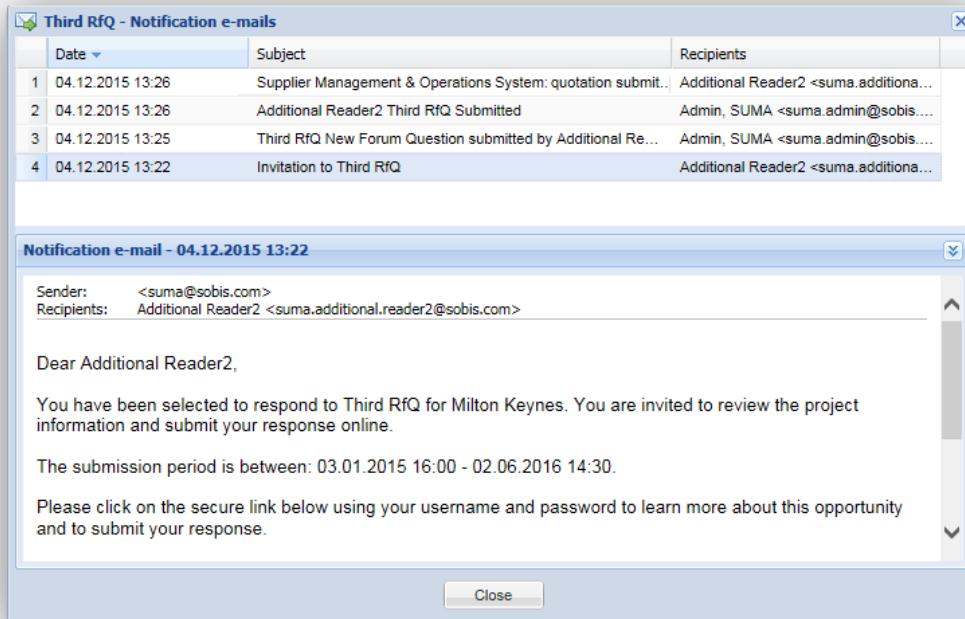
3 Portal application

Users access the application either as internal company user with single sign on or via supplier Portal in which case each user has to self register and get approved by the company that runs the internal application.

The following chapters will explain to portal user how to access the system and navigate within its pages. It will also be illustrated how users are able to customize and personalize views and personal settings.

More details you can find on: PIRS:Sourcing Portal Guide Home

4 Access concept & user groups

Within the application there are several user groups; each reflecting different access rights.

Following user types/groups are available:

- Application Administrator

- Administrator

- Management

- Buyer

- Attendee

- Supplier Contact

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Depending on the user group you have been assigned to, your access rights will differ.

User Type / Group	Description of assigned access and responsibility
Application Administrator	• Access to all information & settings • IT Administrator and Support
Administrator	• Access to all Supplier Management & RFQ & Quotation Management data • Administration area to modify survey templates, keywords, mail settings
Management	• Access to all Supplier Management & RFQ & Quotation Management data
Buyer	• Supplier Management Create and modify supplier management information (Supplier, Supplier contacts, RFI, Audit and Actions) • RFQ & Quotation Management Edit access is based on projects/category of supply Read all sourcing data in the application
Attendee	• Read supplier management data • Modify RFQ attachments • Modify Forum Questions • Compare quotations created by the suppliers
Supplier Contact	• Access is based on invitation for RFQs & Quotations • Only access to the supplier portal • Can only see and edit their own supplier information (including RFI) and the invited RFQ's, quotations and forums

4.1   Verify your access type
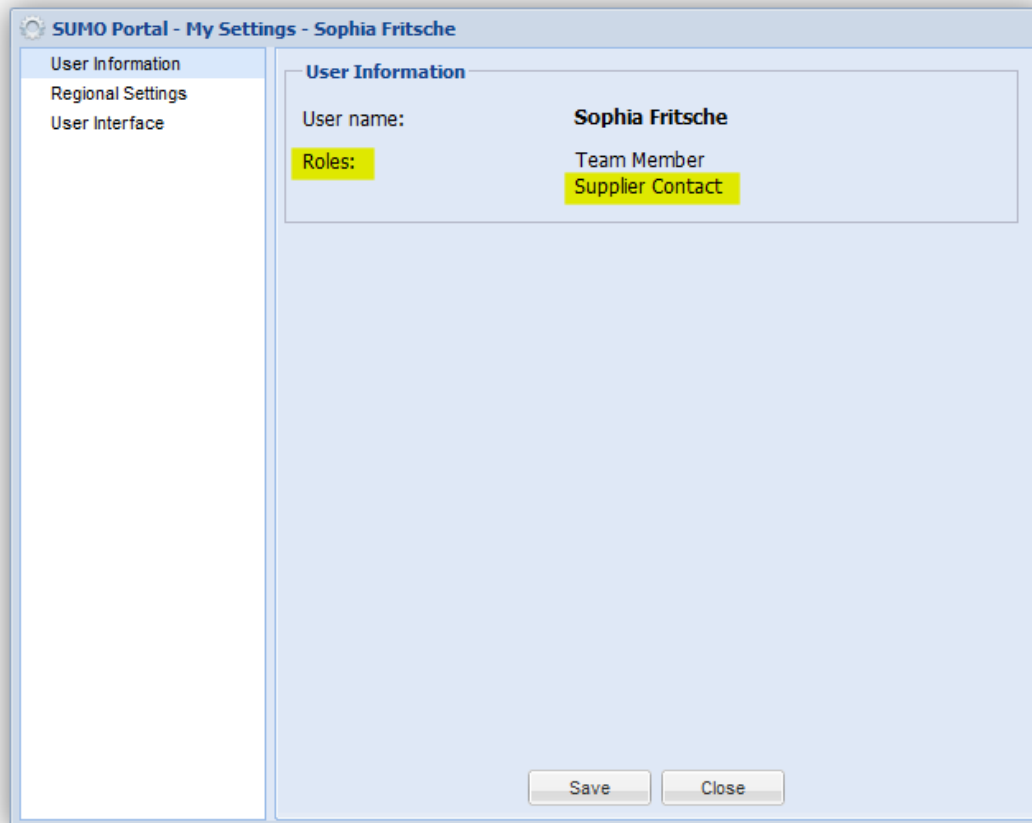
If you are not aware of what access type as been assigned to you, you can check this within your personal setting.

You can open your personal settings by selecting the "My settings" option listed when expanding the arrow head next to your user name in the upper right corner of the application.
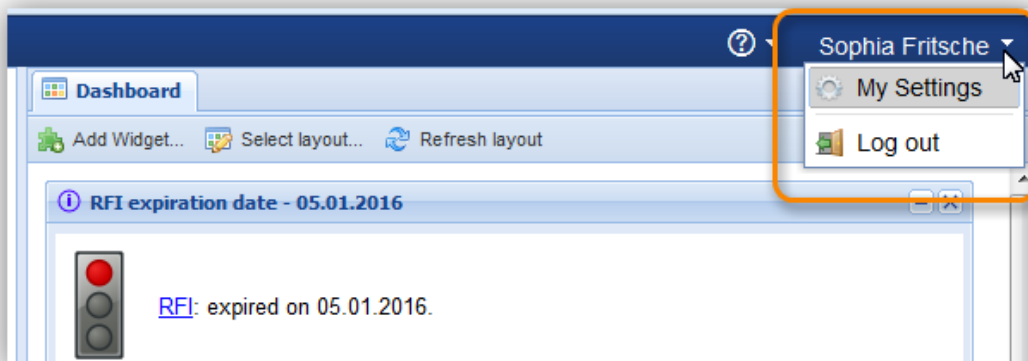
A pop-up window will open allowing you to manage your personal parameters, such as your regional settings or any customisation you have selected for your grid or dashboard display.

By default the window will first display your user information. Listed under "Roles" you will find your assigned access type / group.

5 Announcements

When the application is open and a new announcement is created, this will pop-up in the form of a new message.

The users have now the possibility to add the announcement widget to the dashboard or to read and click "Ok, got it!". The next time the user opens the application, the announcement will not pop-up anymore.

6 Administration

As an administrator you will be able to exclusively view the administration area of your application by clicking the button with the wrench symbol located in the top right corner. Please see button highlighted in the screenshot below.

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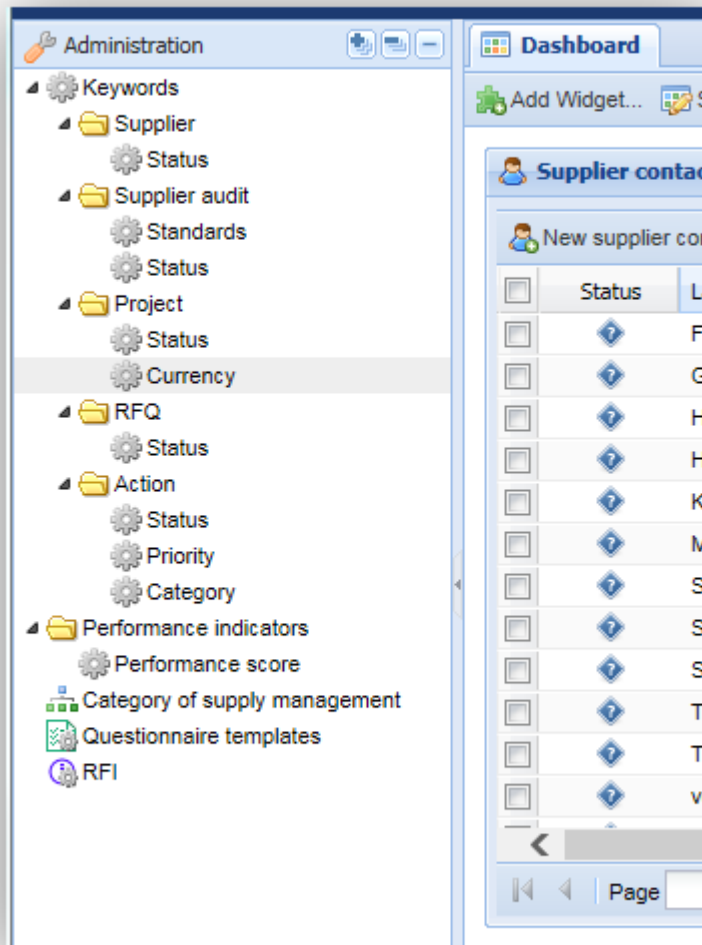
After clicking the wrench button the symbol will change to a wrench with a red strike through (

) and the administration section will be displayed in the navigation pane.

While working within the administration are the regular content sections will not be available in the navigation pane. In order to leave the admin area and reopen the other sections, please

again click the admin button in the top right corner ( ).

6.1 Keywords

6.1.1 Creating a new keyword
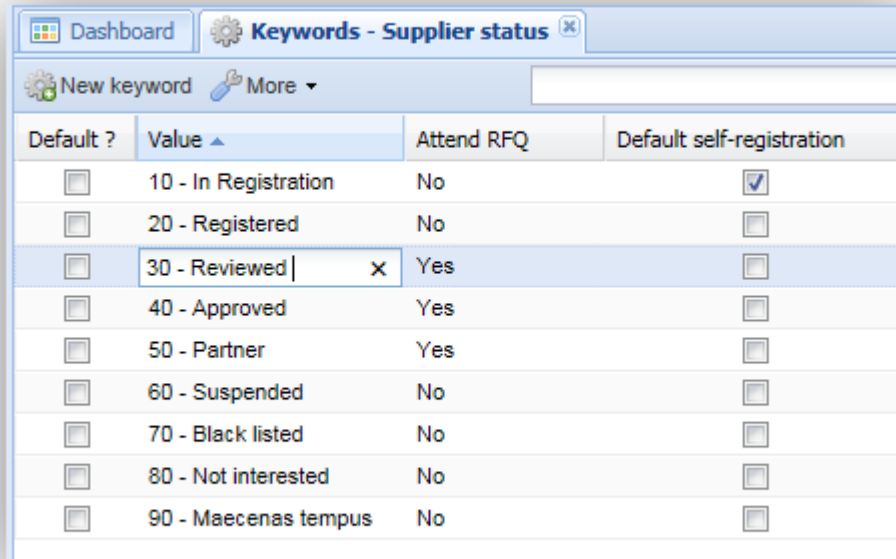
The first section within the administration navigation is "Keywords". The different folders indicate the document types in which the respective keywords belong. Open a specific keyword list by clicking on the respective entry in the navigation pane.
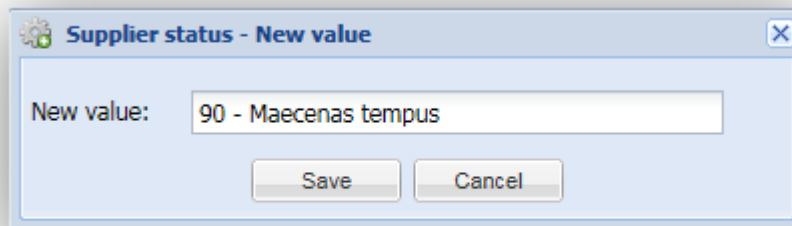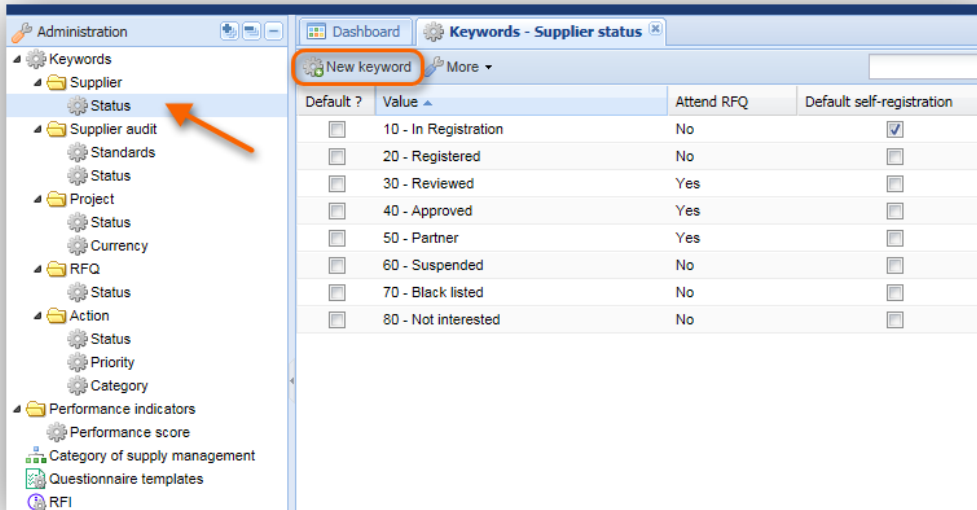
To define a new keyword for the displayed list click the "New keyword" button on the left hand side of the grid action bar highlighted in the screenshot above and enter the new keyword value in the appearing message box.

6.1.2 Updating keywords

There is no additional edit mode required in order to update keywords. Double click directly on a specific column entry of the grid, the cursor will become active and you are able to adjust the keyword value as required.

Default ?	Value ▲	Attend RFQ	Default self-registration
☐	10 - In Registration	No	☑
☐	20 - Registered	No	☐
☐	30 - Reviewed ✕	Yes	☐
☐	40 - Approved	Yes	☐
☐	50 - Partner	Yes	☐
☐	60 - Suspended	No	☐
☐	70 - Black listed	No	☐
☐	80 - Not interested	No	☐
☐	90 - Maecenas tempus	No	☐

In addition to the manually added keywords there are several keyword values, you will be able to select from existing values. For example, if you want to enable supplier that currently have the status "90 - Maecenas tempus" to attend to an RFQ double click the column value and select "Yes".

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Furthermore, you are able to select default values for certain keywords. For example, you have the option to select a default value for the supplier status which will be used if creating a new supplier manually (orange highlighted check box). You can also select a default status value for supplier that self-register using the portal (green highlighted check box).

After saving a new keyword it will be available in the keyword list of the specific document within the application as shown in the screenshot.
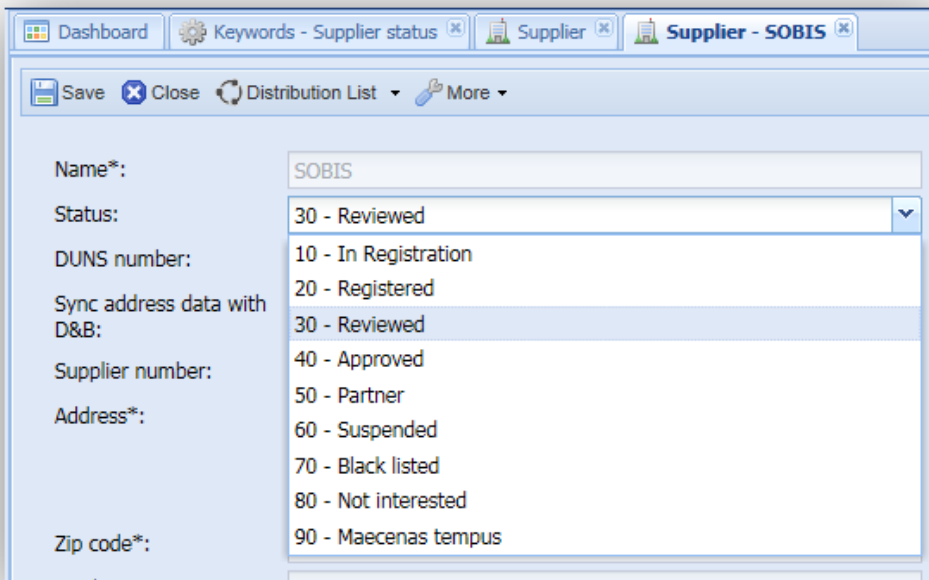
6.1.2.1 Actions offered in keyword views

Alongside the "New keyword" action there are several more actions offered within the "More" options.
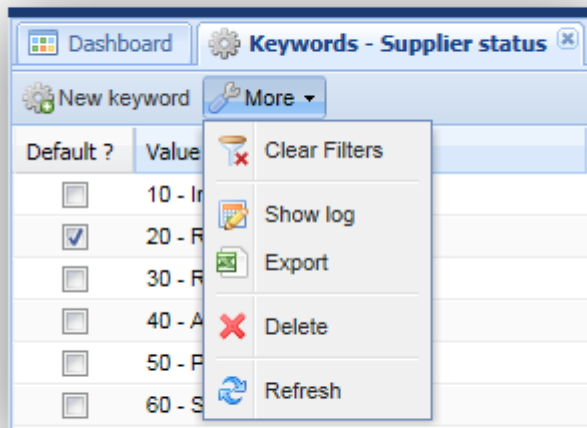
More:

- "Clear Filters" allows you to delete all set filters in one go (please also refer to Customise a grid & Filtering)

- "Show log" displays the log history of the selected document (please also refer to Show Log)
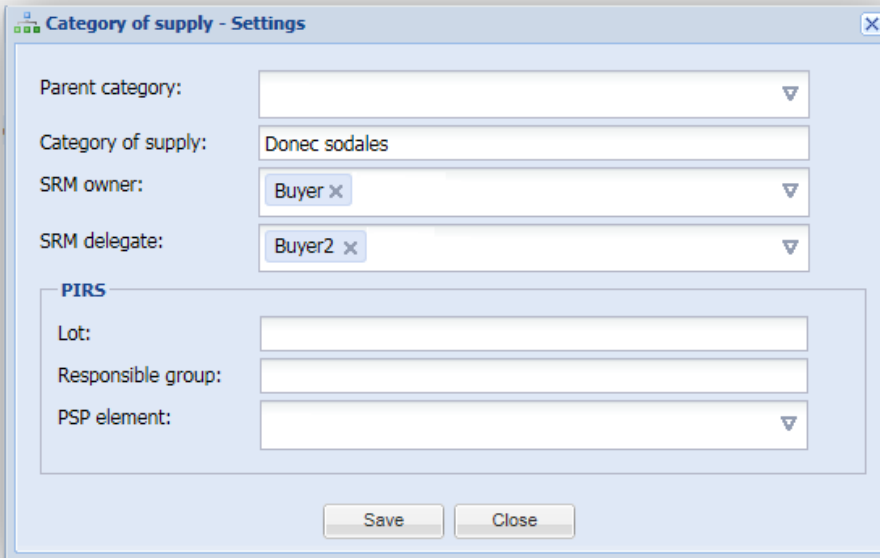
- Export: Allows you to run export, which will create an excel file containing all keywords of the grid and additional data such as the last modified on date

- Delete: As an admin you will be able to hard delete any keyword

- Refresh: Refreshes grid display to include all made changes

6.2   Creating a new category of supply

In order to create an new category of supply management, first select the respective section within the navigation pane. Next, click the "New category of supply" button highlighted in the screenshot below.
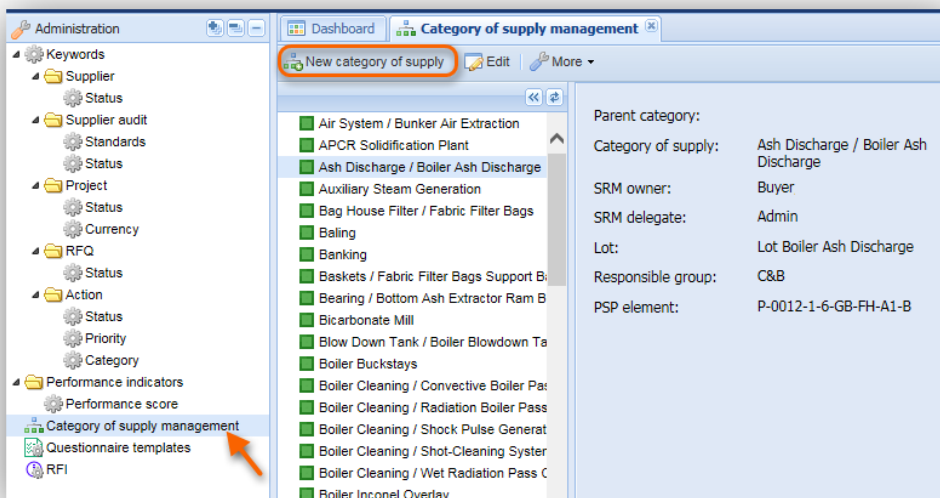
A pop-up window will appear allowing you to select a value from the list existing parent categories, enter the name of the new category and define an SRM owner as well as delegate. For the SRM owner and delegate it is required to select users from the application/active directory group "buyer". Users chosen as SRM owner and delegate will have extended access and editor rights to RFI/RFQ and SRM Actions.

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6.2.1 Actions offered in Category of supply management

6.2.1.1 Update or edit a category of supply

In order to edit an existing category of supply select the entry within the list of categories in the content grid and click the "Edit" button.
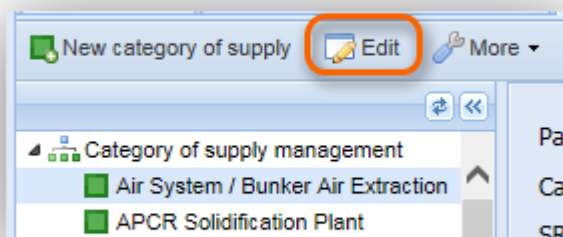
The entry will open in another pop-up window allowing you to adjust the values.

Alongside the "New category of supply" and "Edit" action there are several more actions offered within the "More" options.
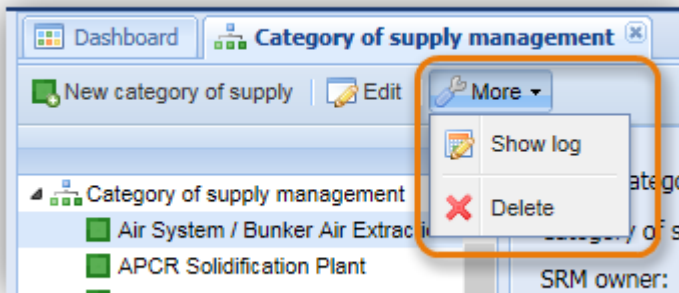
More:

- "Show log" displays the log history of the selected document (please also refer to Show Log)

- Delete: As an admin you will be able to hard delete any keyword

6.3   Questionnaire templates and RFI

In the administration area you will be able to create and edit questionnaire (RFQ) and RFI templates. When selecting either of the sections in the navigation, the list of existing RFIs respectively questionnaire (RFQs) templates will open in the content area.

6.3.1   Creating a new template

You have two options for creating a new RFI / questionnaire template. You can either create a new template from scratch or copy an existing template and modify the copy based on your requirements.

In order to create a new template from the start click "New RFI" / "New questionnaire template". RFQ templates can be limited to special number of projects.

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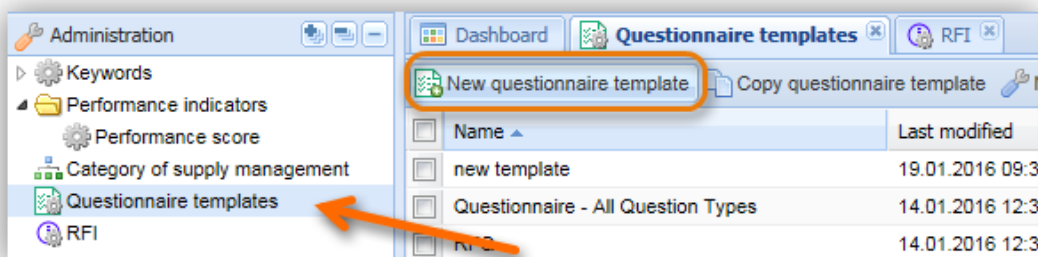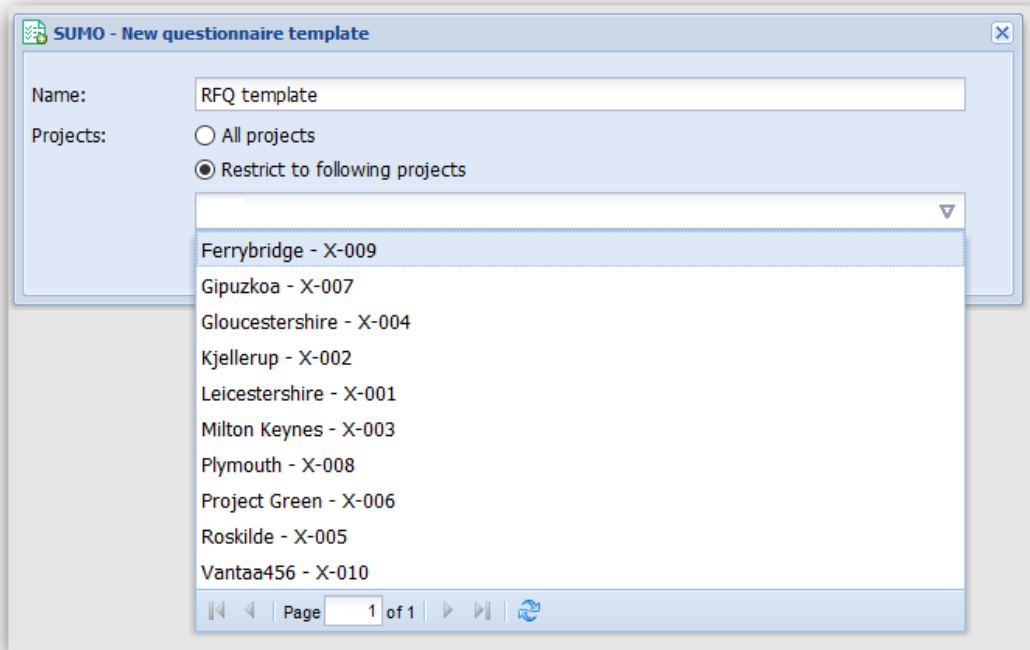
A pop-up window will appear allowing you to enter a template name. After naming the new template, click "Save" and the empty template will be listed in the template view.

6.3.2   Edit templates and add questions to new templates

To add questions to a newly created template or to edit existing templates, open the respective grid entry with a double click. The template will open in a new application tab. As with the questionnaire tab in your RFI and RFQ documents within the internal application, the template has a navigation pane showing all existing questions and a content area allowing you to edit the question.

To create new questions e.g. for a newly created template use the "New question" button and manage the creation of the questionnaire as described in chapter RFQ questionnaire.
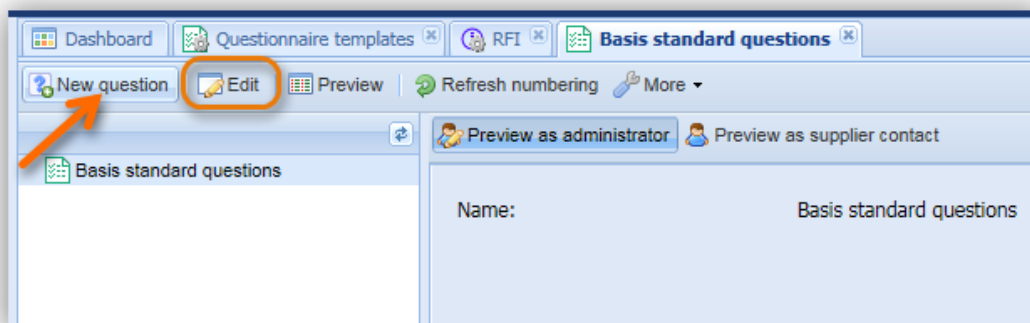
In case you need to edit the name of a template click "Edit" and a pop-up window will allow you to adjust the template title.

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6.3.3 Create a new template based on existing templates

In order to copy an existing template select the entry in question within the template grid and click "Copy RFI" / "Copy questionnaire template" as illustrated in the screenshot below.
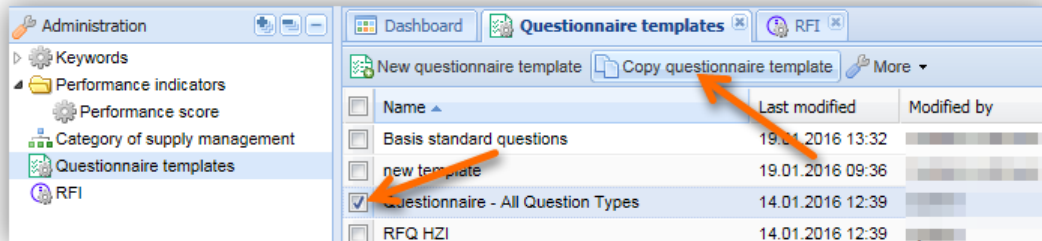
A template copy will be generated and added to the list of templates. To rename the template and edit the copied questions as well as creating additional questions double click the new entry.

6.3.4 Update questions of an assign RFI template or RFQ

The functionality should give the PIRS:Sourcing administrator and the buyer responsible for the a RFQ the choice to modify a existing question, without the reset of the submission and the deletion of the existing answer given by the supplier contact.

The function is available for the RFI and RFQ, but only for the users that are allowed to edit the RFI template (administrator) or the RFQ (buyer) and should apply every time the RFI template/RFQ is saved.

Following questions type are available for a RFI template or RFQ:

- statement

- single choice

- multiple choice

- free text

- number

- date

- simple table

- table

In following cases, there will be NO option to NOT reset the answers and the submission. Following message will appear, if:

- the question type is changed (valid for any type of question)

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- the field "Value" (options given for answers) for questions type "Single choice" and "Multiple choice"

When the question type of a existing question is changed or the value of a single or multiple choice question, then following message will appear, with no possibility of other selection.
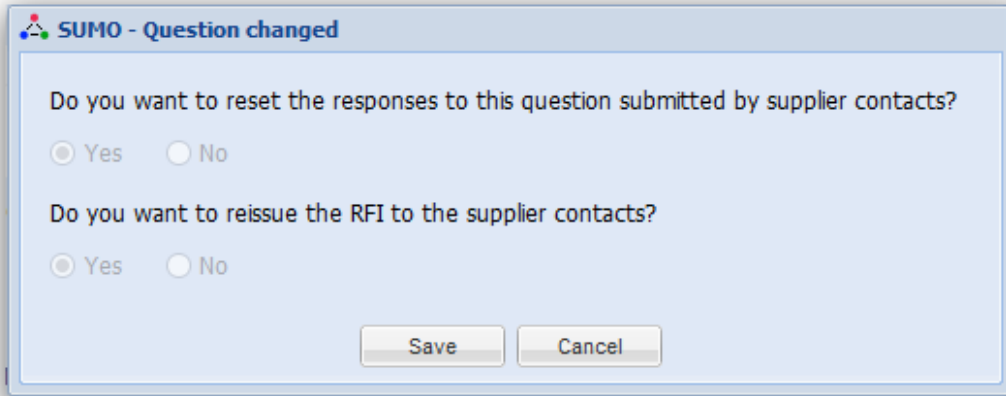
If following changes are made to an existing question:

- change the title of a question

- change of mandatory property of a question

- allow additional comments option

- change the description text of a question

- add or remove attachments

- change of header and column 1 to 10, for simple table question

- change of column 1 to column 3 and header 1 to 11, for table question

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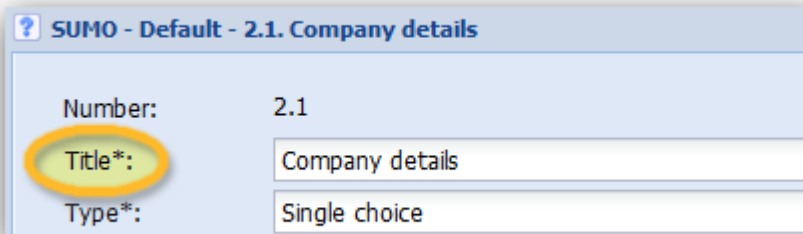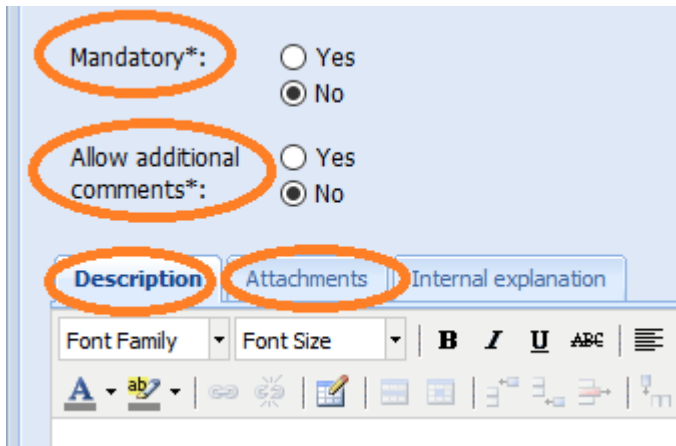
the message will appear, with any combination possible:
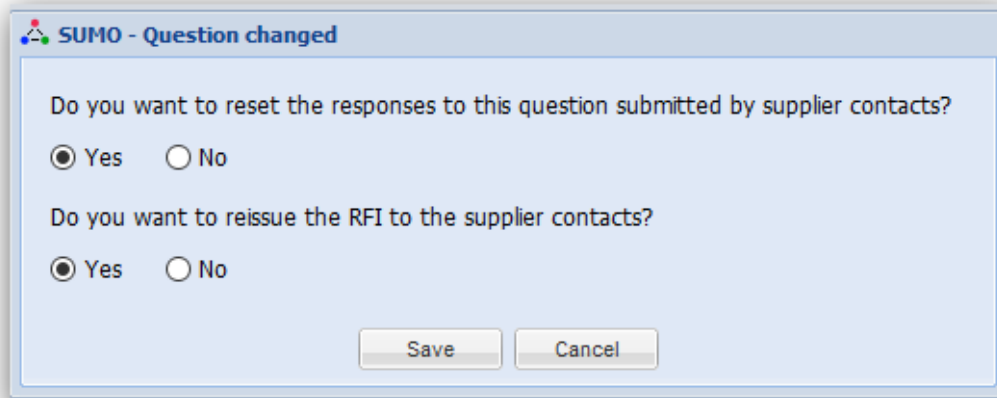
The reset process is NOT triggered if the scoring properties are changed or the internal comment.

The reset process is not going to be changed, if a new question is added to an existing template or if the "refresh numbering" button is activated.

If a question is deleted from an existing template, the reset process is not started (like it is today). The reset process is started only of the numbers for the existing questions will be changed via "refresh numbering", after the question was deleted.

The updated area section and the notification e-mails are not influenced by the new reset/re-issue process.

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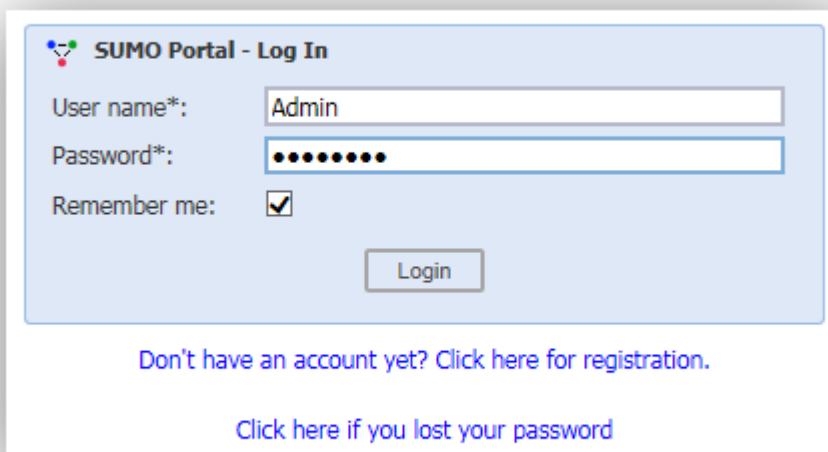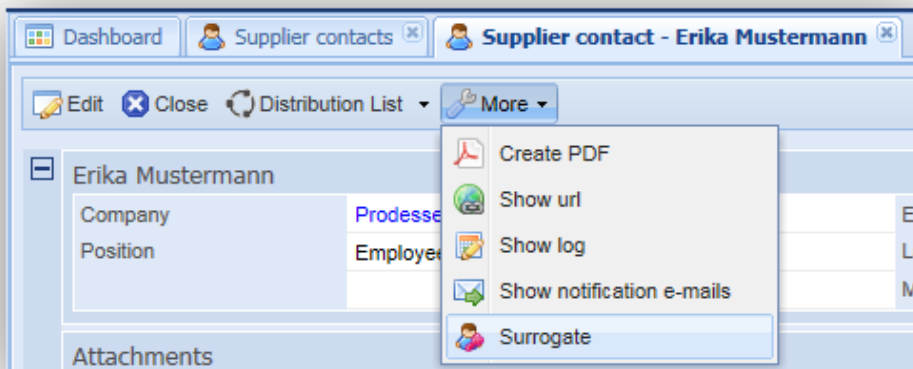
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6.4   Surrogate

The administrators of the application have the possibility to log into the portal on behalf of a supplier contact, edit their contact information and place a bid or RFI on their behalf.

The log-in can be initiated directly in the internal application by using the "Surrogate" option available to admin user within the supplier contact, supplier RFI and RFQ documents. Only the administrator will see the "Surrogate" button in the action bar of the supplier contact, RFI and quotation document (refer to screenshot below).

Using surrogate option as administrator

As mentioned above, only administrator will have the "Surrogate" action listed within the "More" options. Once you click the Surrogate button you will be asked to enter you log-in credential which equal our active directory credentials.

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After correctly entering the credentials the Portal application will be opened in a new tab. In case you have used the supplier contact to access the Portal as surrogate, you will be able to directly make changes on behalf of this supplier contact.

When using the surrogate function from the RFQ and RFI, you will need to select a supplier contact in the appearing message box before the respective RFI or RFQ document will be opened in the Portal.
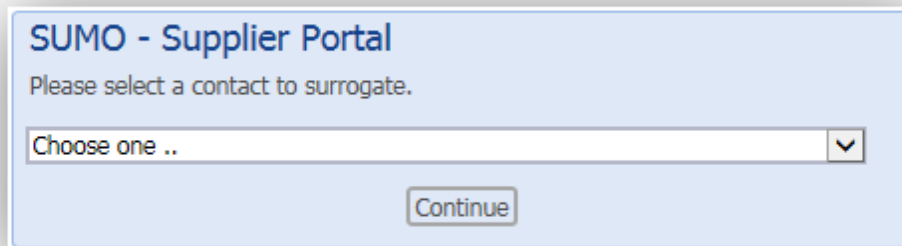
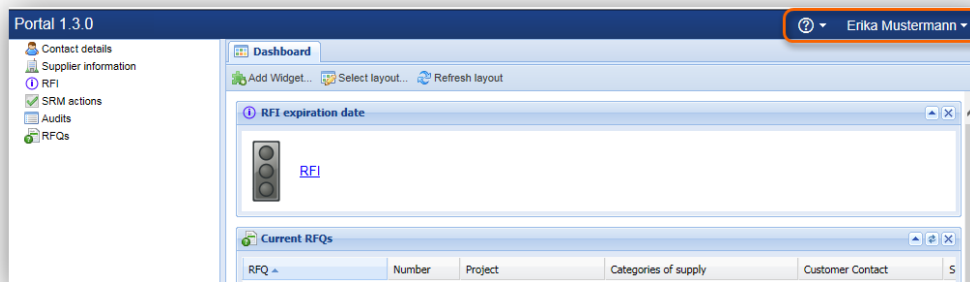Working within the Portal application using the surrogate functionality will give you access to all data and actions available for the particular supplier contact.

Document Log

To trace whether changes have been made by an admin using the surrogate action or by the supplier contact himself, all changes and actions made by the admin will be logged in detail within the document log. In case the modifications were done by an admin the field "Modified by" will contain following value:

"First name + last name (of administrator) **on behalf of** first name + last name (of supplier contact)"

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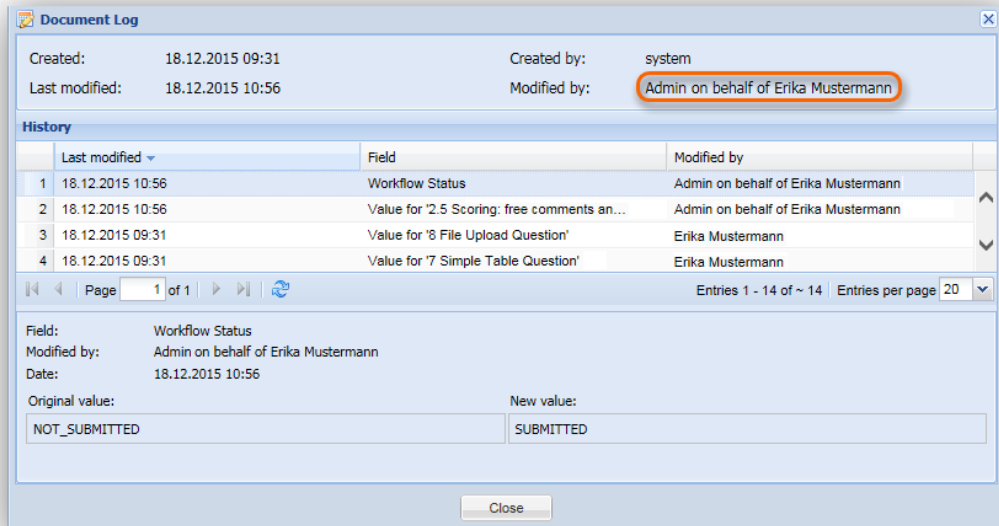
Submit on behalf of the supplier contact

The submission of an RFQ or RFI on behalf of the supplier contact is also supported. Notifications e-mails to the internal responsible buyer will be generated. The user listed in the notification as initiator of the submission will reflect the surrogate action similar to the log entries.

Creating a new forum question

The same set up is used in case the administrator is creating a new question within the forum. The question will be marked as "private" and the user listed as questioner will be the administrator on behalf of the supplier. The notification e-mail will be sent to internal responsible buyers in case of commercial question and to the attendees of the RFQ, if the question is marked as technical.

6.5   Supplier - Creating a new supplier without DUNS number
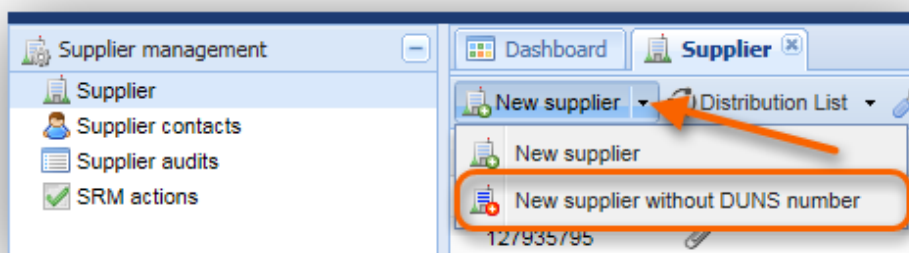
Besides being able to create a new supplier using the applications DUNS interface to D&B, as administrator you are also allowed to create new suppliers without syncing company information from D&B. To create a new supplier without reference to D&B expand the "New supplier" options by clicking the small arrow that appears once you hover the cursor over the button as highlighted in the screenshot.

Next select the action " New supplier without DUNS number".

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Similar to the supplier edit mode, you will now be able to edit all fields. However, no information is generated automatically.

Please keep in mind that still all mandatory fields must be completed in order to save the new supplier.

For additional information and instructions on how to update a supplier-document as well as available actions in read and edit mode refer to chapter Create & update suppliers.

6.6   Supplier - Sync address data with D&B

As administrator you have the option to decide whether or not a supplier document should be synchronised with the D&B database and retrieve company information using the D&B interface.

This option might be useful in case the information within the D&B database is currently out of date. If for example a supplier has moved offices to a new address and the D&B database has not yet been updated, you are able to deactivate the synchronisation and enter the new address manually. As administrator you are always able to disable or enable the connection with the D&B database for a specific supplier.

To activate or deactivate the connection open the respective supplier document in edit mode and select "Yes" or "No" for the supplier setting "Sync address data with D&B".

Please be aware that if the synchronisation is enabled, the manual editing of company data retrieved from D&B is not supported and the respective fields will be greyed out for all user able to edit the supplier document.

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Please note:

Selecting "Yes" does not trigger an automatic synchronisation of the information with D&B. In order to initiate a synchronization select "Update D&B information" listed under the "More" options in the action bar.

6.7   Define a new announcement

A new announcement can be defined in the administration area, from the grid "Announcements", by using the button "New announcement".

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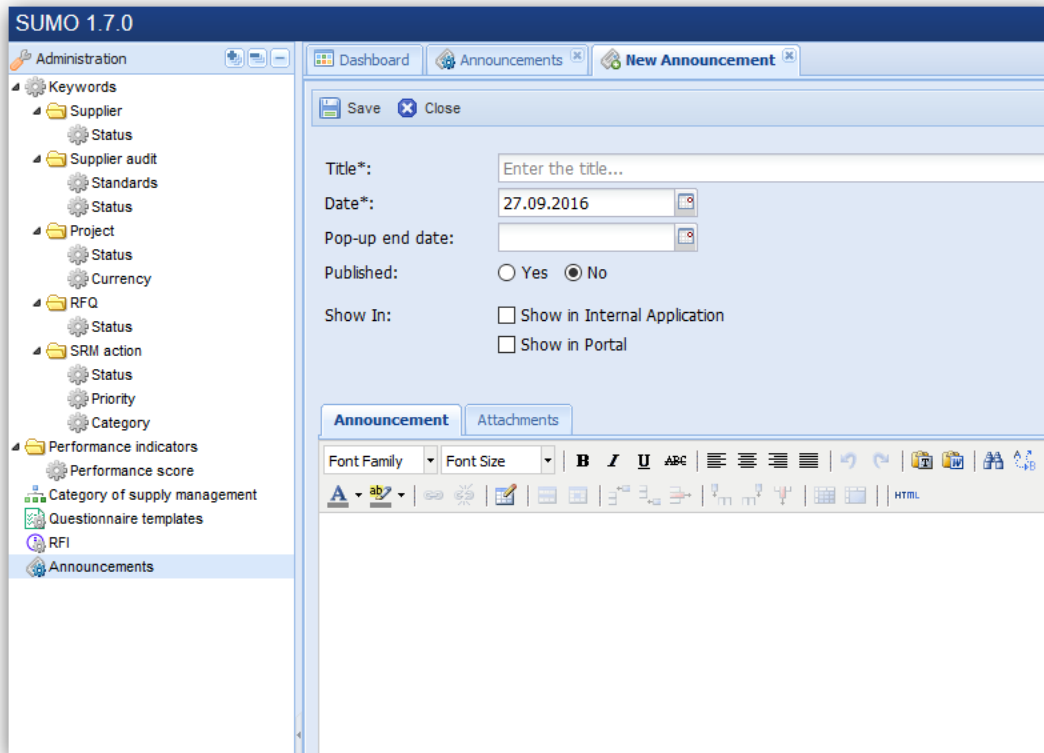
7 Release notes

In this chapter you will find a list of release notes that will be maintained and adjusted with each new release and that will give you the opportunity to follow PIRS:Sourcing newest features.

Release	New feature(s)	Short description	Link to chapter in this guide
2.2.0	• Improved New Supplier menu • Define a Budget and a Currency for an RFQ • Technical Improvements	 PIRS Sou...oved.pdf	[Create Supplier](#)
1.9.x	C64 - C64 - RFQ/RFI - Download of attachments from questionnaire	Additional functionality to download all attachments from the RFI/RFQ in one go. Within the RFQ or RFI, under 'MORE' you find this option and download all attachments to a ZIP file.	
1.8.x	C47 - Audit - additional 'Internal Attachments'		[Supplier audits](#)

Release	New feature(s)	Short description	Link to chapter in this guide
	C52 - new reset of questions process C53 - SRM Actions - assign actions to internal user C55 - Changes to the project performance questionnaire C56 - New widget with open/not answered/not submitted project performance questionnaires C57 - new RFI report C58 - Split application setting for PIRS:Sourcing help Improvements: Email notification of submitted RFQ's will be send also to internal Attendees Fixes: Searching in the grid and widget RFI scoring error in the log history	The PIRS:Sourcing Portal application is linked to a new help documentation.	Questionnaire templates and RFI SRM actions Project Performance Project Performance c. Reporting
1.7.x	New features: C14 - RFQ templates C15 - Project performance C26 - Expiry date of certificates C27 - Batch creation of SRM actions C29 - Announcement C50 - Excel spreadsheet of category of supply tree C51 - Final milestone payment date Improvements: Addition of project name and number in the submission e-mails for quotations		Questionnaire templates and RFI Project Performance RFQ questionnaire SRM actions AnnouncementsDefine a new announcement

Release	New feature(s)	Short description	Link to chapter in this guide
	RFQ security after due date is exceeded Fixes: Read mode pf project - display of awarded quotations for a new project		
1.6.x	C36 - new access concept sourcing area C41 - new question type "table" Improvements: Unable to access the RFI, if the supplier names contains an apostrophe (SOBIS-239) Provide predefined date/number formatter in templates to enable display of date/numbers with personal settings	Please read the help chapters for more details. The DUNS record contains number & date fields that have to be formatted manually in the past, now the format is set individually via user settings.	Access concept & user groupsRFQ questionnaire
1.5.x	C31 - Improve SRM action closure C33 - RFQ attendance Improvements: Ensure that only enabled supplier contacts can be added/invited to RFQ Add new section "Invited suppliers" to read mode of RFQ in the internal application Fixes: Cannot filter column SRM owner in the supplier grid	Please read the help chapters for more details.	SRM actions View SRM actions RFQ's Invited suppliers, RFQ, quotationsRead RFQ information
1.4.1	C576 - show modified scorecard on RFI entry page C21/22 - new registration process in the PIRS:Sourcing portal, with integration of category of supply	Please read the help chapters for more details.	RFI - Request for information Self-registration Forum questionsSupplier audits

Release	New feature(s)	Short description	Link to chapter in this guide
	C17 - D&B interface - integration into self registration process		
	Change distribution group for technical questions - add SRM owner & delegate		
	Add new field "sub-supplier" to audit in the internal application and portal		
	Attachment tab - new hint "Drop files here to upload"		
	Fixes:		
	Support (STS) - Ticket 0069109		
	Problem when a question type is changed from simple table to file upload type		
	Order of SRM owner names in Supplier grid different then in edit mode of document		
	Final registration window / "Thank you for your registration" message		
	Cannot save supplier created based on DUNS number in the internal application (China)		
	SUMA Self Registration: Potential categories of supply is not mandatory anymore		
	Error when open RFQ by using distribution list link		
1.3.4	Internal explanation for questions	A new field is available in the internal application, where internal explanation related to each question can be managed.	RFQ questionnaire Score quotation RFI - Request for information